

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 20.1 Web/VRU/CSR  
Installation and Configuration***

*February 15, 2016*

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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 20.0 (or higher) VRU, Web, and CSR Servers to Relius Administration 20.1. To install Relius Administration 20.1 on a workstation, please refer to the Relius Administration 20.1 Installation and Configuration document. All references to the Relius Administration 20.1 Voice Response Units powered by Edify will be hereinafter called RA VRU. All references to the Relius Administration 20.1 Internet Server will be hereinafter called RA Web. All references to the Relius Administration 20.1 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 20.0 or higher) or configure a new server.**

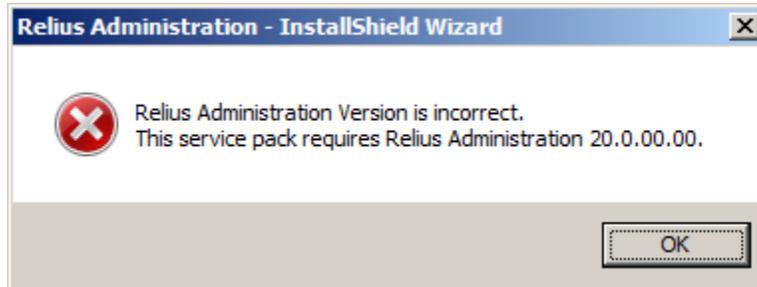
- **If updating an existing server, it must already be running Relius Administration 20.0 or higher before beginning. Prior to running this installation, the databases and workstations must already be updated to version 20.1.**
- **If installing on a new server, Oracle 11g Client, included in the Relius Administration Component DVD, should be installed before installing Relius Administration 20.1.**

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 20.1 is installed and fully functional at each workstation and the databases have been successfully upgraded.
- 3) 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 the Web/VRU/CSR Update.
- 6) Configure and test the Web/VRU/CSR systems.

## Important Note

If you are upgrading the Relius Administration Web, VRU, or CSR modules, you must already be running the latest release of Relius Administration before applying this release. This means that your workstations and database must already be running Relius Administration 20.1, upgraded from Relius Administration 20.0. In addition, your WEB, VRU, and CSR servers must also already have 20.0 installed.



## **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 20.1 Web/VRU/CSR is only available via download from the SunGard Relius support web site (<http://www.relius.net/Support/Technology.aspx>). 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 <http://www.relius.net/>. 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.

A 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 and VRU 20.1 are 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 20.0 or later Web/VRU/CSR. If your system is at an earlier version, you must first upgrade your server to RA 20.0.

## 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

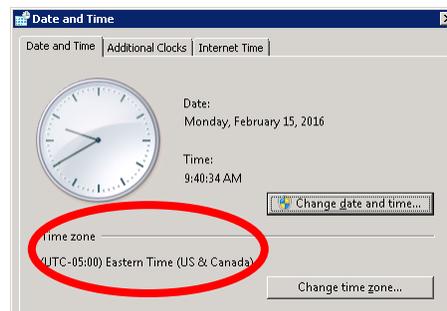
VRU systems are now only supported on Windows Server 2008 R2 running Edify 13. If you have not yet obtained your new Edify software, please contact Relius Technology Support before beginning this installation.

## 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.

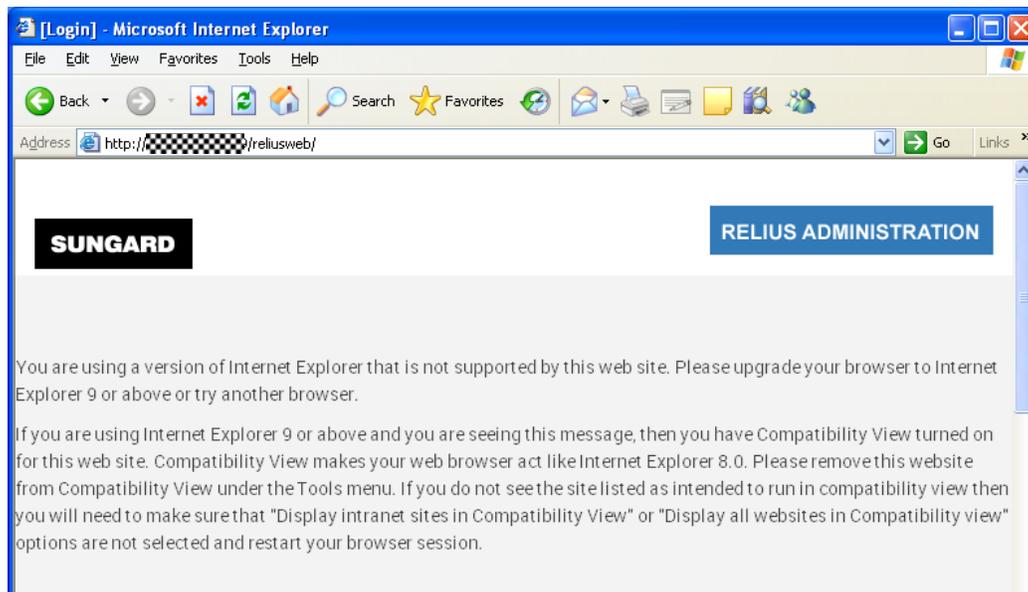
## 2.12 Time Zones

The Web server and your Database server must be in the same Time Zone in clock settings. To check these settings, click the clock in your system tray, and then click “Change date and time settings...” Then check to make sure the “Time zone” on each server matches each other.



## 2.13 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 9. If a system accesses the site with IE 8 or earlier, they will receive a message similar to the one below.

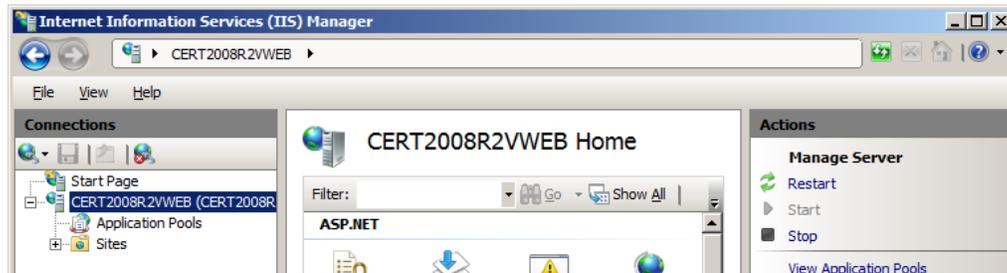


### 3 Setting Up a Web Server

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.

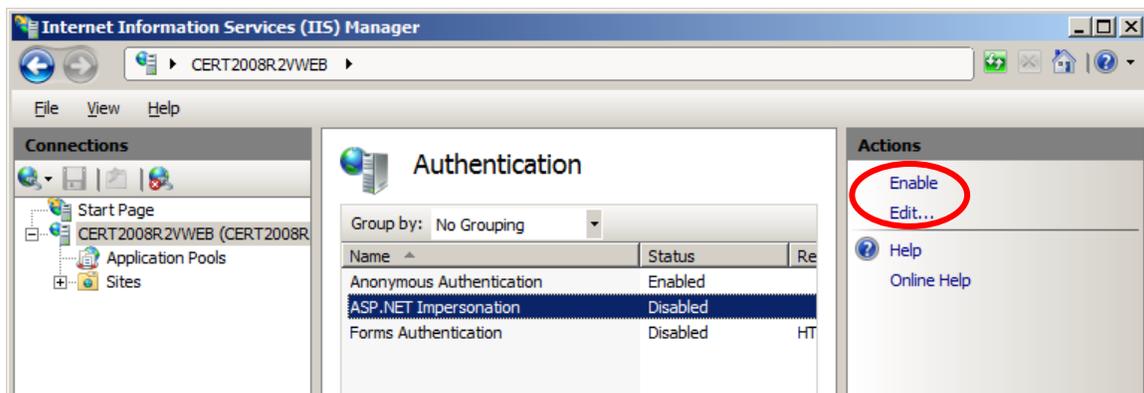
- 3.1 Create a “Relius Web” user account. This account can be either a local user or a domain account, but it must be a member of the local IIS\_IUSRS user group on the server. (For installation purposes, SunGard Relius recommends that this user have local administrative privileges on the server. However, if your company’s security policies dictate, the user can be removed from the local administrators group after the installations are complete.) 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:
    - 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:
    - Svc-ISAPI-2.0
    - Svc-ISAPI-2.0-64
    - Svc-ISAPI-4.0\_32bit
    - Svc-ISAPI-4.0\_64bit
- 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.

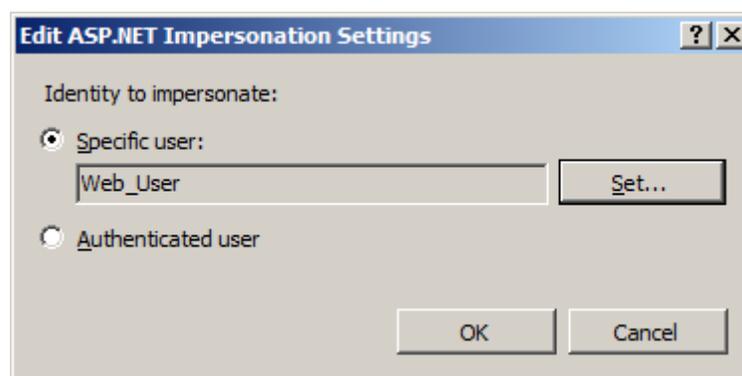


- 3.5 Double-click *Authentication*.

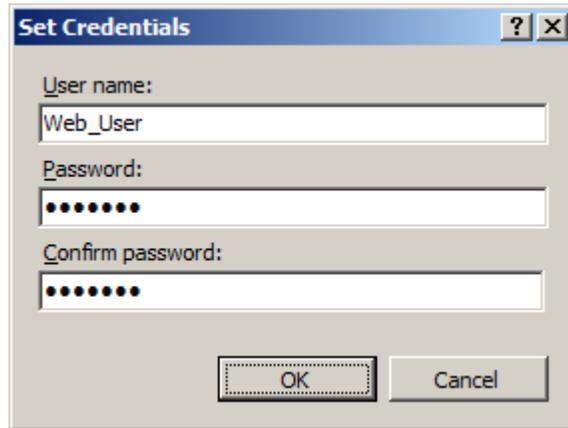
- 3.6 If ASP.NET Impersonation is disabled, right-click it and enable it. After it is enabled, right-click ASP.NET Impersonation and click “*Edit...*”



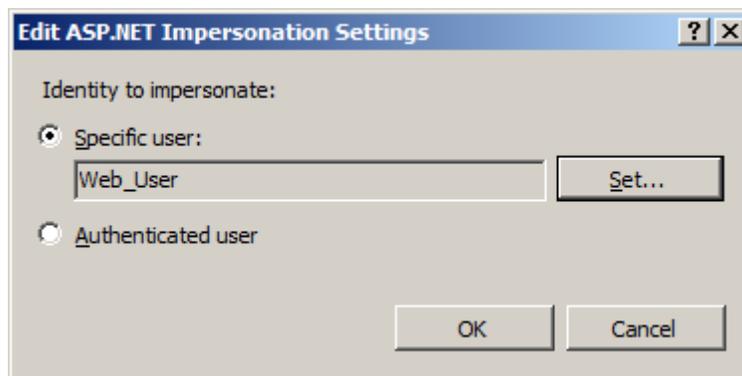
- 3.7 Choose “*Specific User,*” then “*Set,*” and enter a user name with local Administrative privileges.



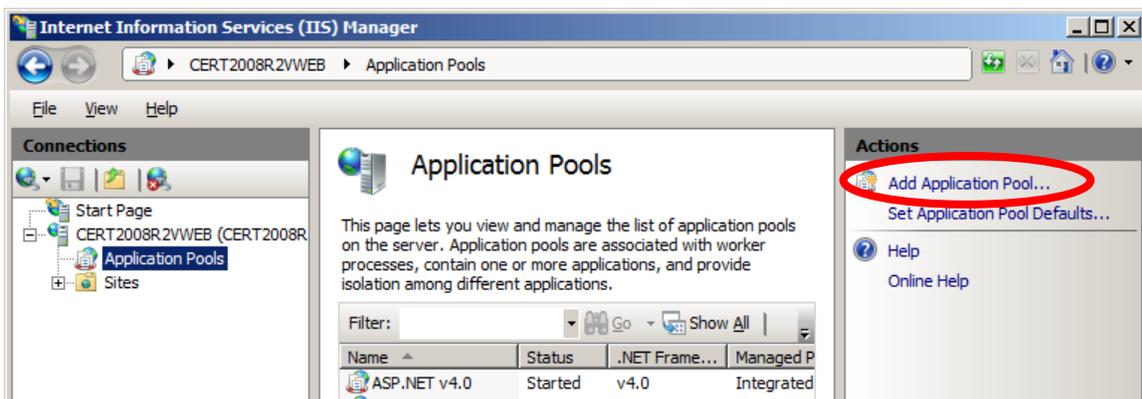
- 3.8 You will also need the password for this user. Note that if the password expires or is changed that anywhere this user was established must be set to the new password.



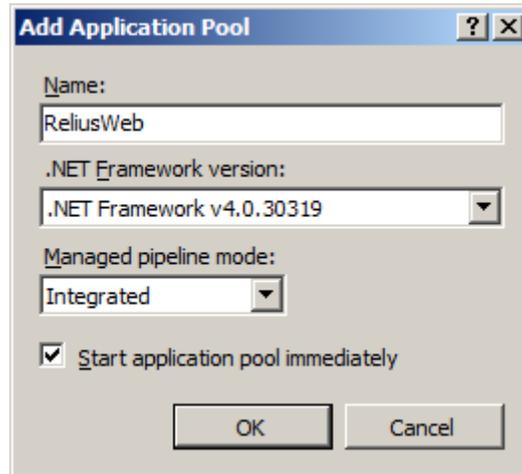
- 3.9 Click OK. Note: if the password ever changes for this user, these steps will have to be repeated.



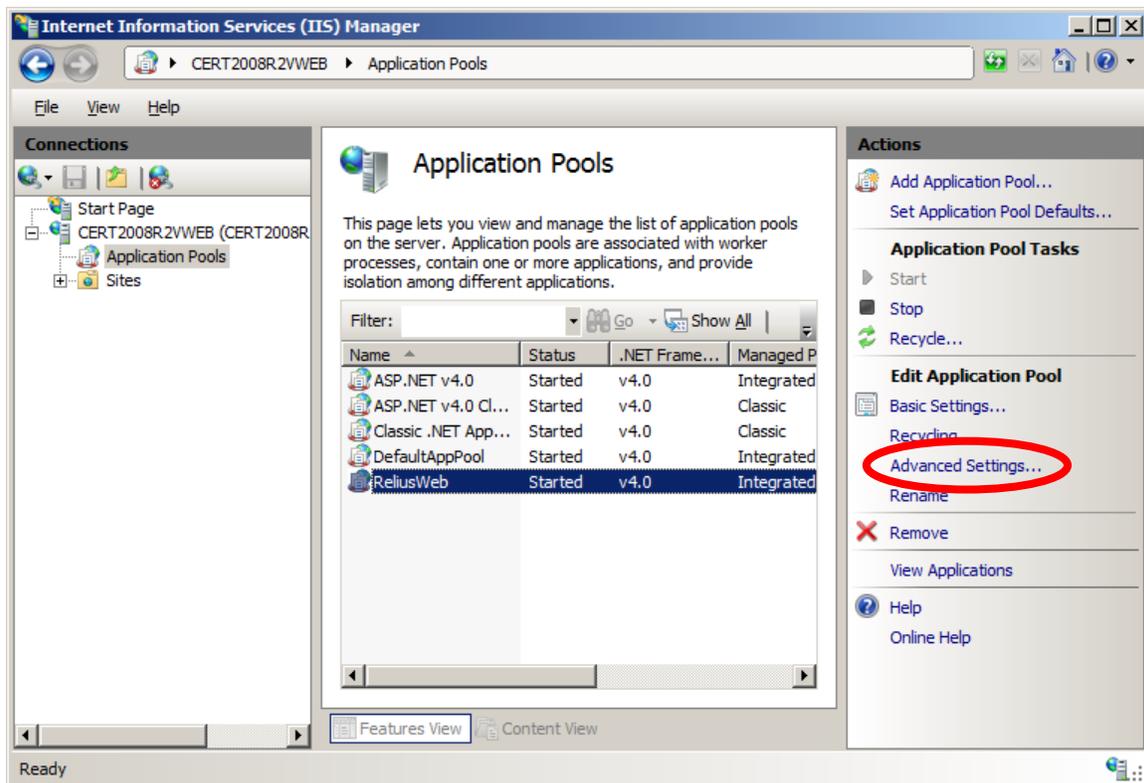
- 3.10 During the installation, an Application Pool named ReliusWeb will be created. **However, on Windows Server 2012 and Server 2012 R2, this Application Pool needs to be created before the installation.** In the Application Pools window, click *Add Application Pool....*



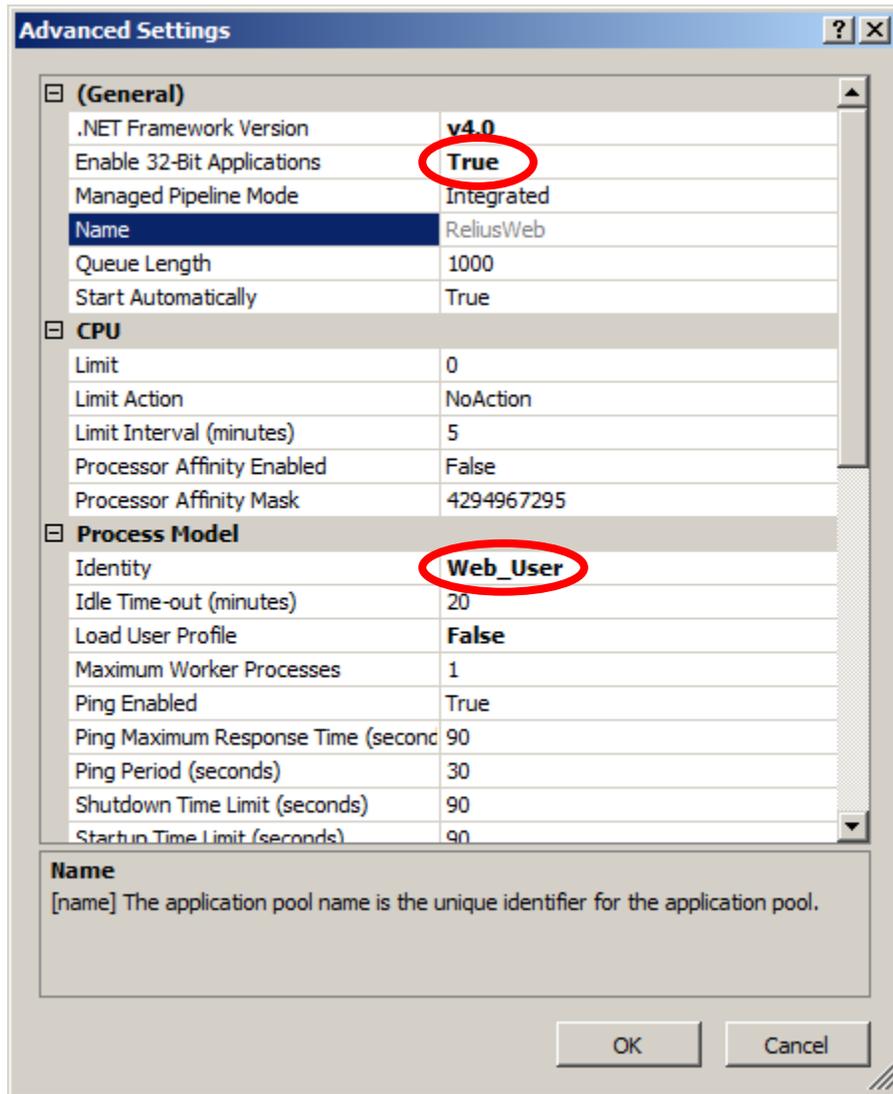
- 3.11 Type ReliusWeb in the Name field. Ensure the other settings match what is shown below and click *OK*.



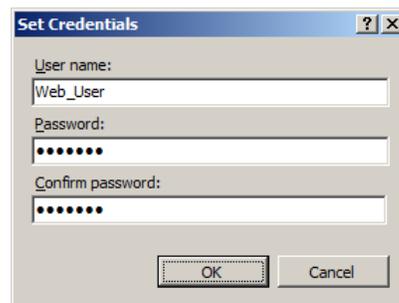
- 3.12 Click the newly created ReliusWeb application pool, and then choose “Advanced Settings...” to make the next set of changes.



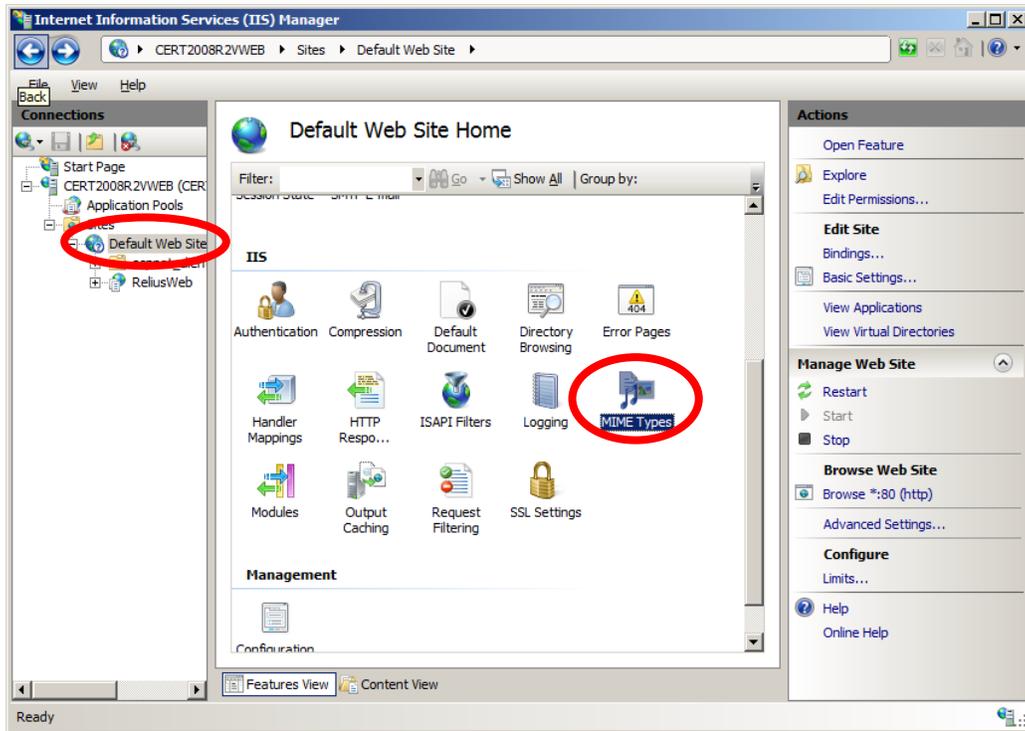
3.13 Change “Enable 32-Bit Applications” to **True**. Then change the “Identity” field.



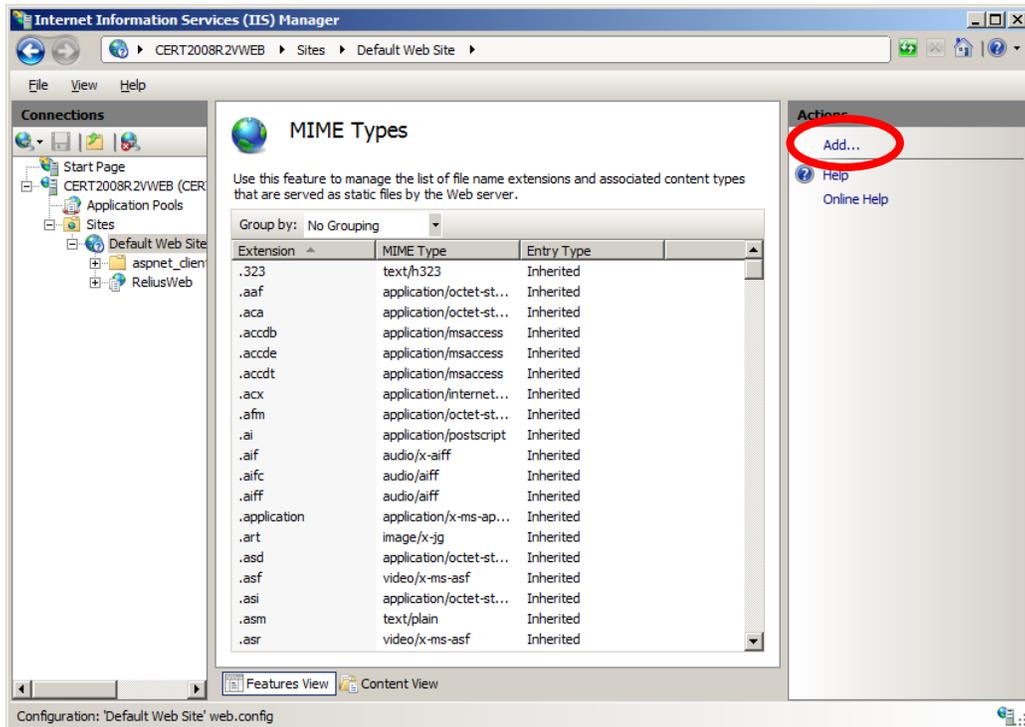
3.14 Choose “Custom account,” click the **Set** button, and enter the credentials for “Web\_User.”



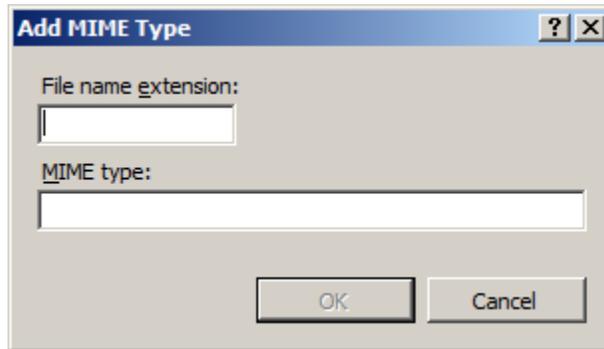
- 3.15 An additional setting needs to be added. In upcoming releases of Relius Administration Web, the product will be using embedded operating system fonts. In IIS, expand the “tree” and click **Default Web Site**. Then, double-click **Mime Types** under IIS.



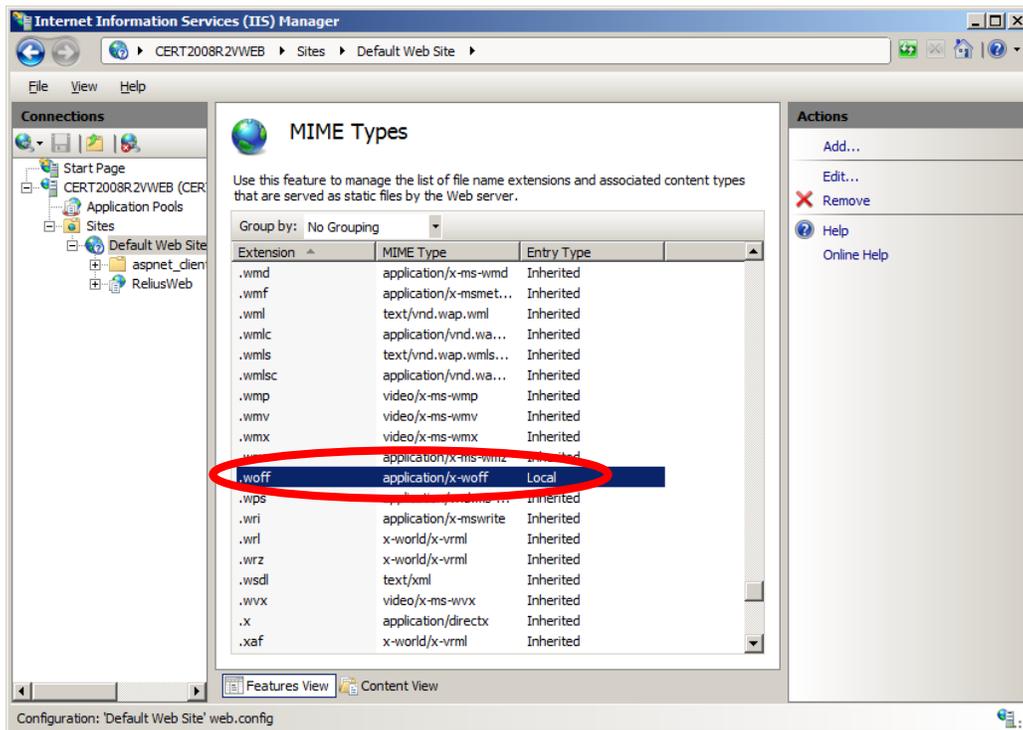
- 3.16 On the right side of the MIME Types window, click **Add...**



- 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.



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



- 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. For further instructions, contact Relius Technology Support.

## 4 Performing the Relius Administration 20.1 Web/VRU/CSR Installation

### Pre-installation Notes:

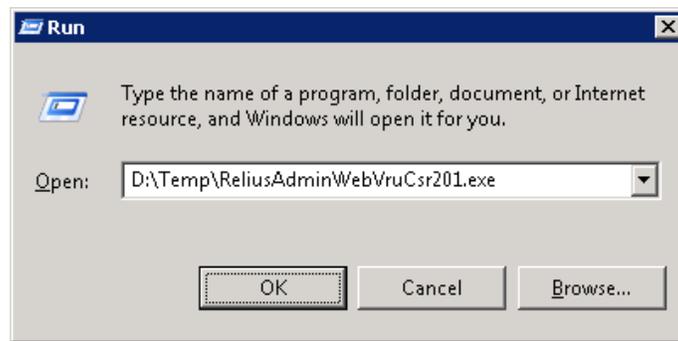
- a) This installation is valid Windows Server 2008 R2, 2012, and 2012 R2 (Standard, or Enterprise Edition) for Web/CSR Servers and Windows Server 2008 R2 Standard or Enterprise for VRU Servers. Any other operating system (such as Web or Datacenter edition) is not valid or supported.
  - b) Relius Administration 20.1 must be installed and fully functional (including database upgrade scripts) at each workstation before beginning this installation.
  - c) Be sure no screen saver will become active during the installation. If a screen saver is to be used after the installation, the default “logon” and the “blank” screen savers use the fewest resources on the server.
  - d) The installation process takes approximately 1 hour to complete. The process of upgrading the databases may take longer, depending on the amount of data in the databases.
  - e) Ensure you have a valid backup of your server(s) and a valid database export before proceeding. SunGard 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 (<http://www.relius.net/>) 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. Also, you may wish to add our web site to the trusted site list which may prevent that blocked state.
  - 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.**

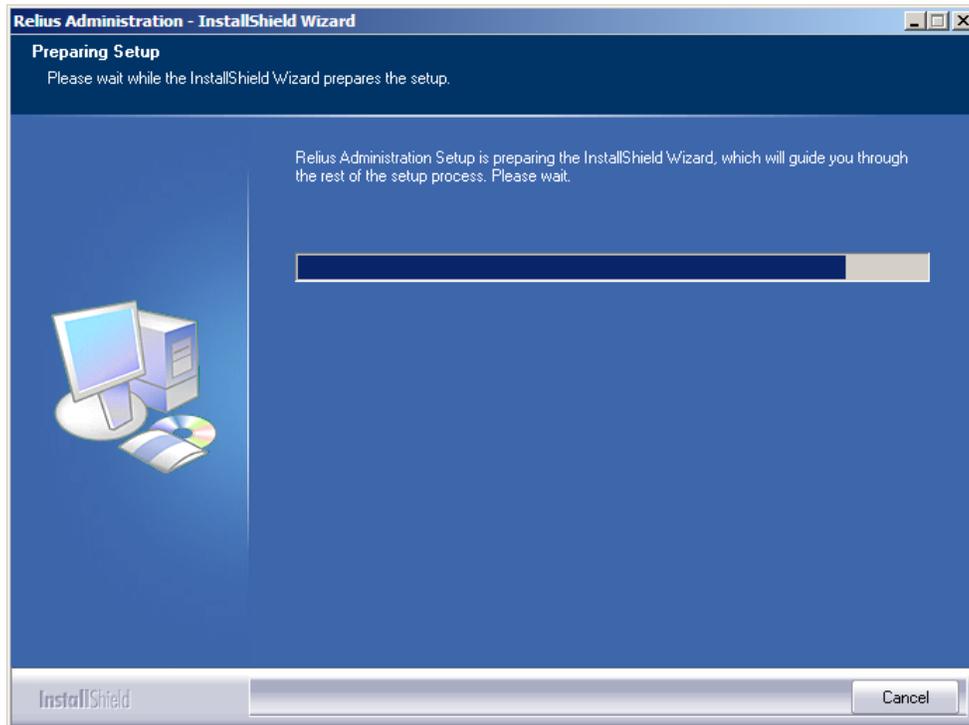
4.7 Temporarily disable all virus protection.

**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.**

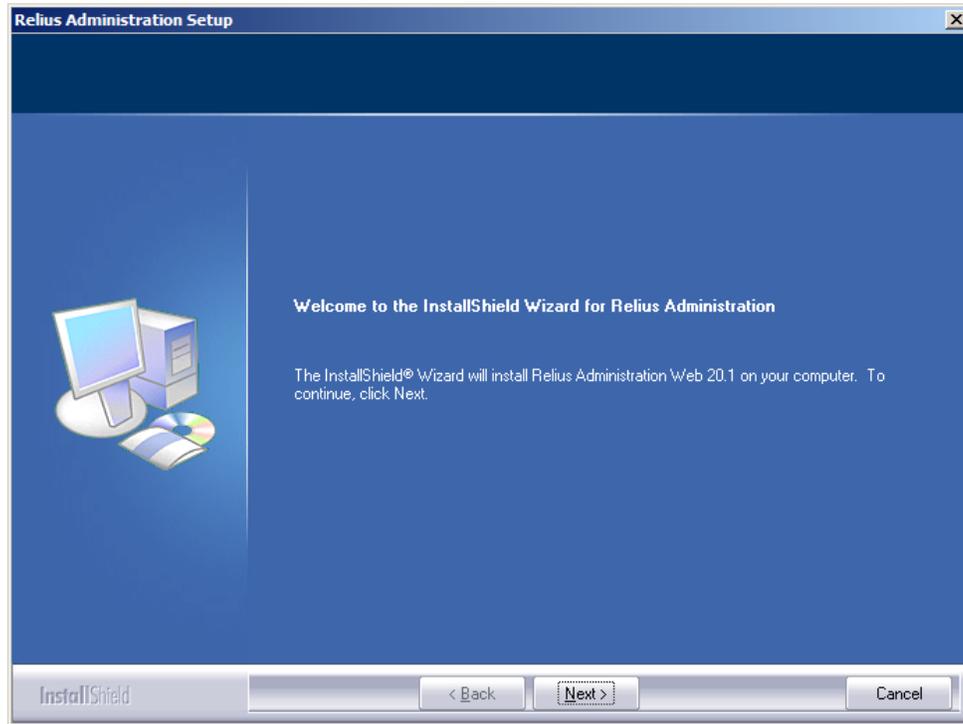
4.8 Click *Start*, then *Run* and type **D:\Temp\ReliusAdminWebVruCsr201.exe** in the command box, then click *OK*.



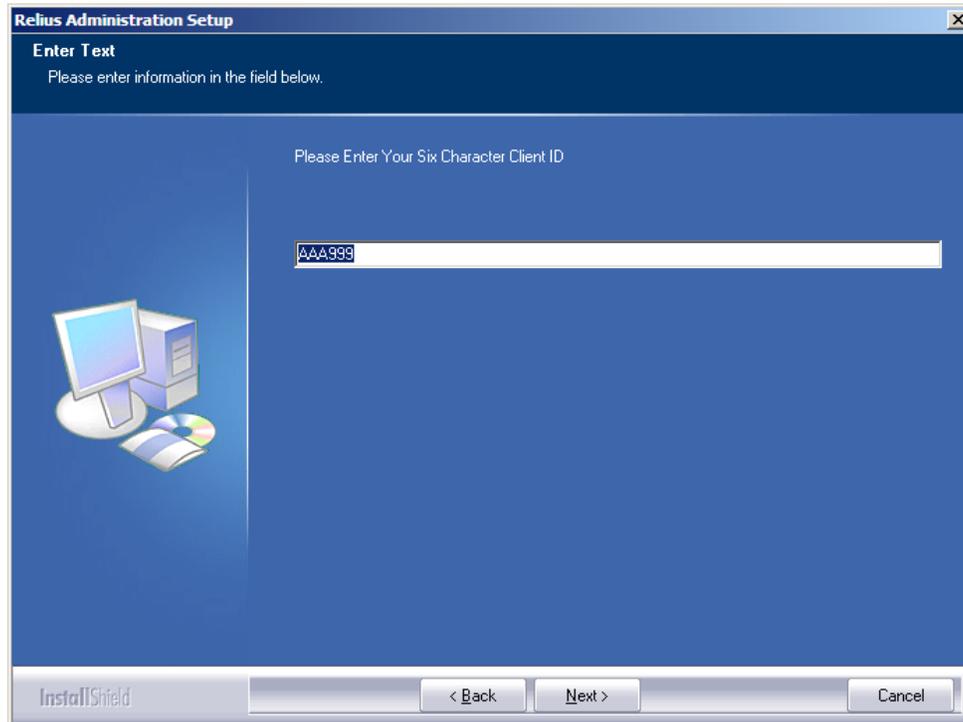
4.9 Because this installation is a self-extracting executable, several files will extract and copy to temporary locations for the installation process.



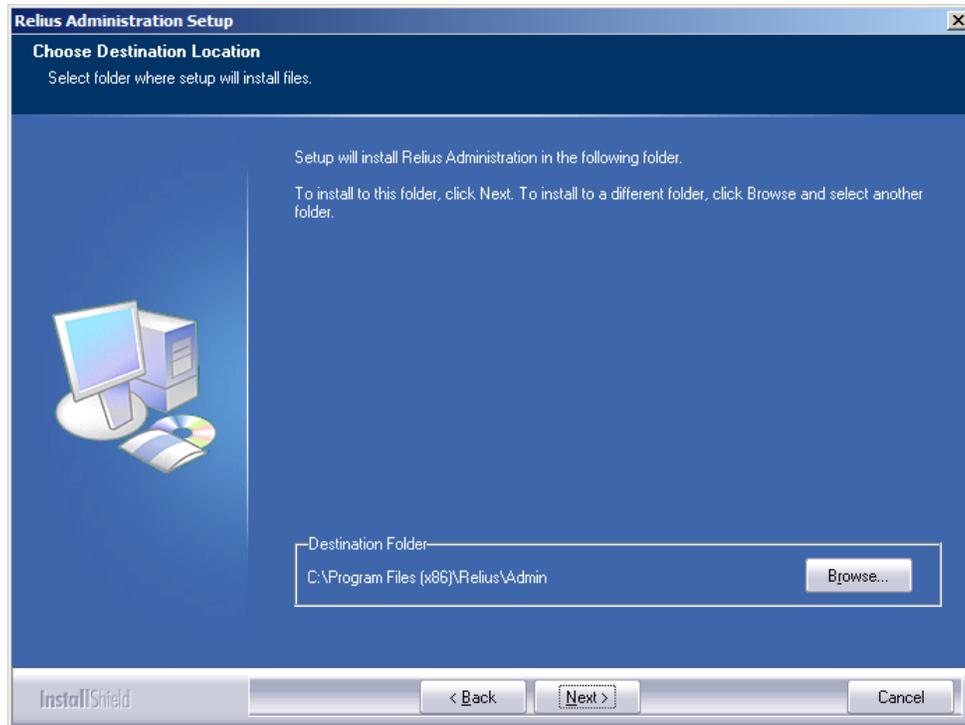
- 4.10 The Relius Administration 20.1 Web/VRU/CSR Installation “Welcome” screen appears. Click *Next* to continue. Upgrade installations will skip to Step 5.3.



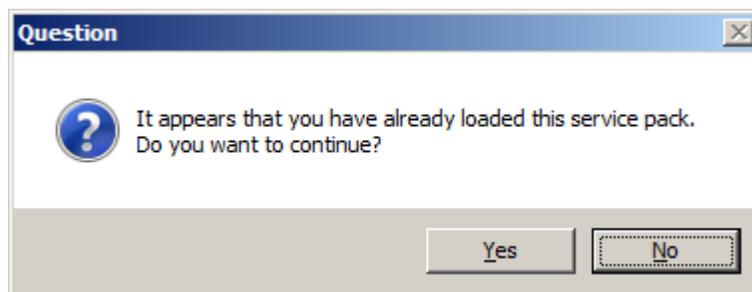
- 4.11 New installations will prompt for the ClientID. Enter the six-character ClientID provided by SunGard Relius and click *Next*.



- 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*.



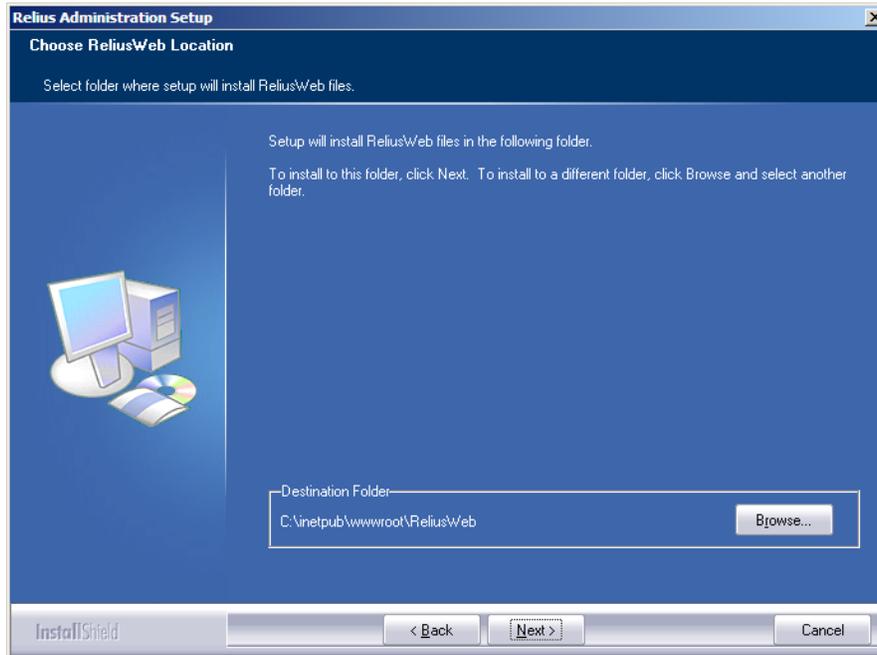
- 4.13 If you have already installed this release, you will be prompted to continue. There is usually no harm in continuing, but it is not always necessary. Special circumstances may dictate reapplying this update, such as troubleshooting and maintenance, or at the recommendation of Support.



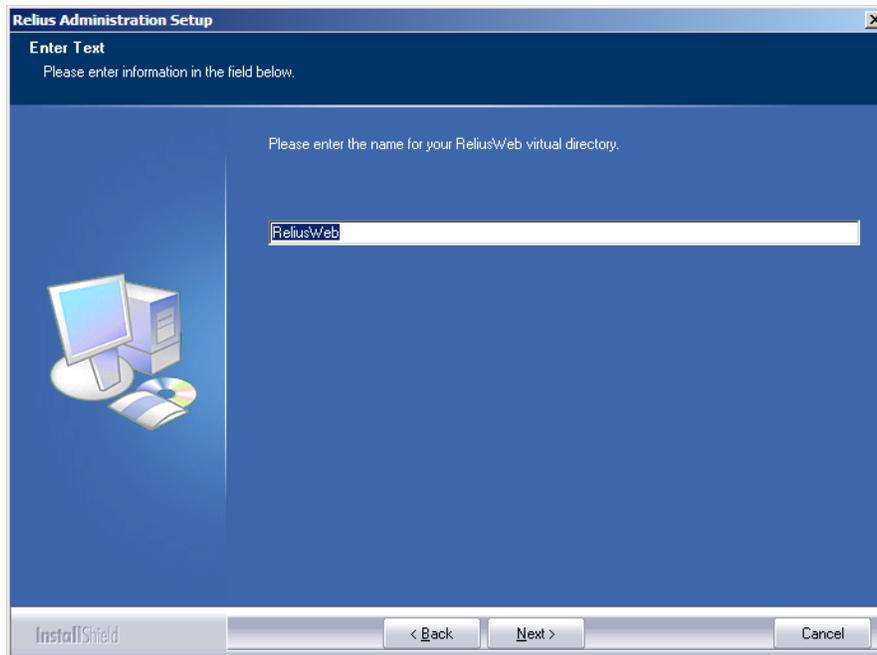
- 4.14 At this point, the installation will proceed according to your server's configuration. Web installations continue with Section 5. VRU installations continue with Section 6.

## 5 Web/CSR Installation Specifics

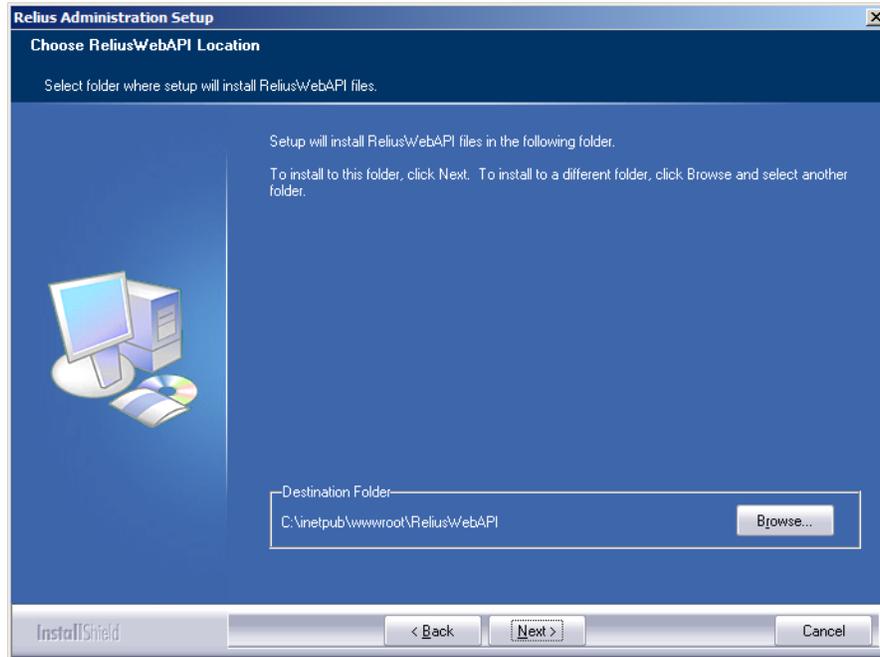
- 5.1 New web installations will be prompted for the path of the first web site that will be created. The default is C:\inetpub\WWWRoot\ReliusWeb.



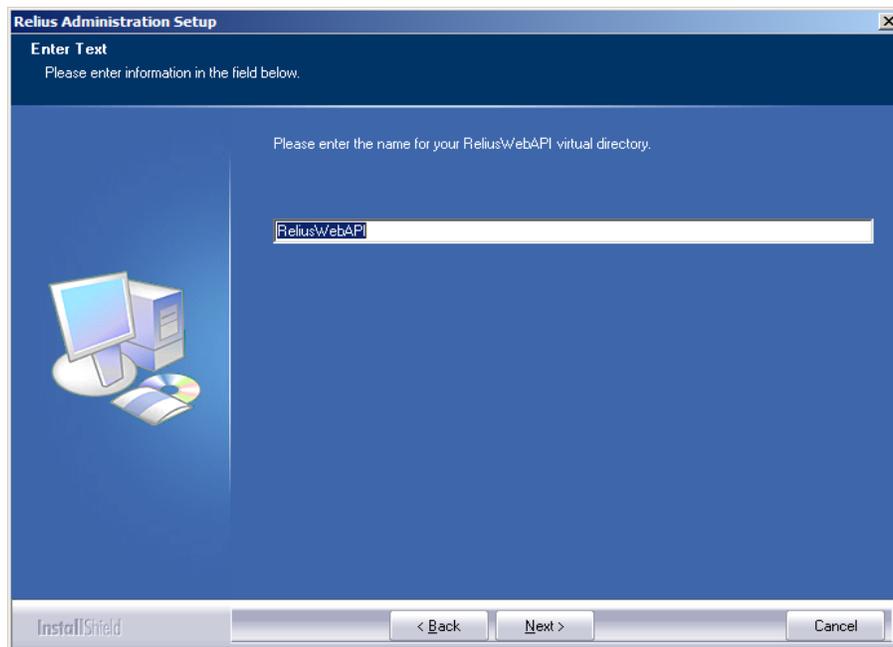
- 5.2 New web installations will be prompted for the virtual directory name of the first web site that will be created. The default is ReliusWeb.



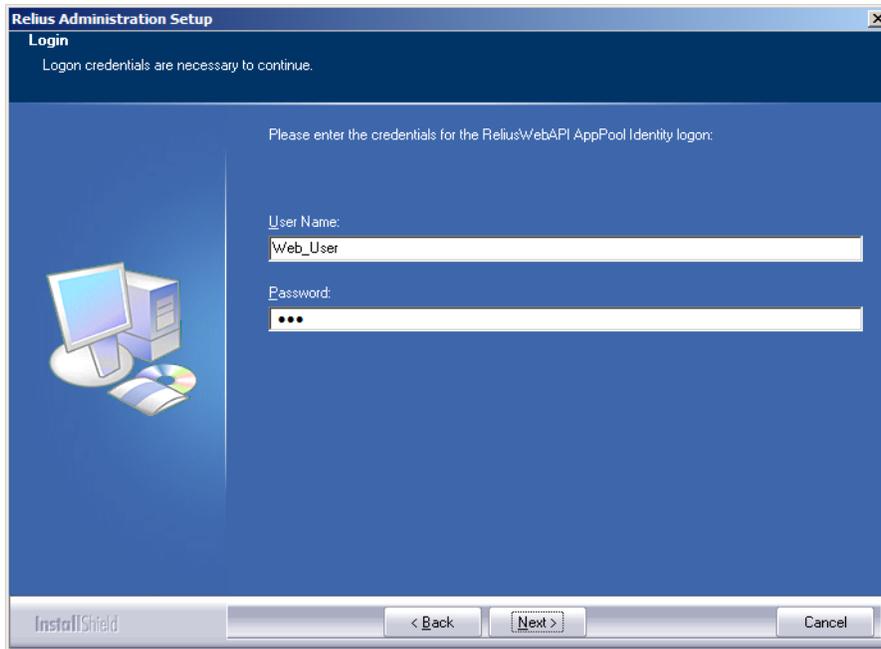
- 5.3 You will be prompted for the path of the API site that will be created. **This is different than your Relius Web sites.** The default is C:\inetpub\WWWRoot\ReliusWebAPI.



- 5.4 You will then be prompted for the virtual directory name of the API site that will be created. The default is ReliusWebAPI.

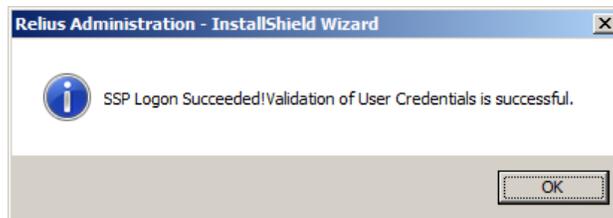


- 5.5 With a new API comes a new application pool. You will be prompted for the credentials for the application pool. You only need one API application pool if you are only connecting to one database. They can be the same as your designated “Web User.”



- 5.6 Note: If you are using multiple web sites, you have the option to create additional API sites after the installation. However, you only need additional API sites if you are attaching to multiple databases.

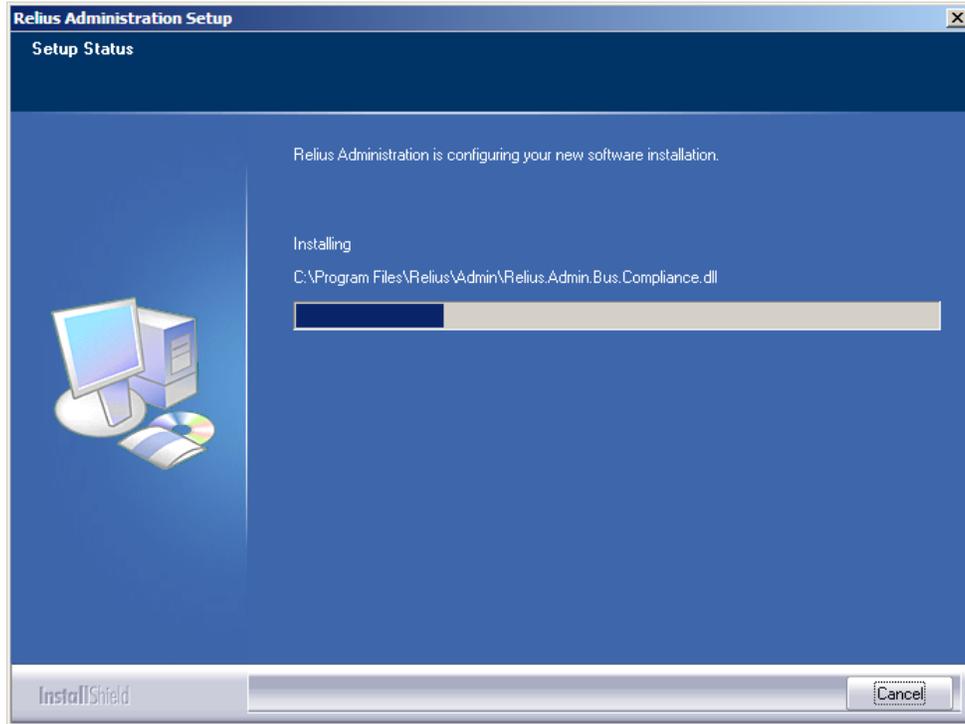
- 5.7 When the login credentials have been verified, the installation will continue.



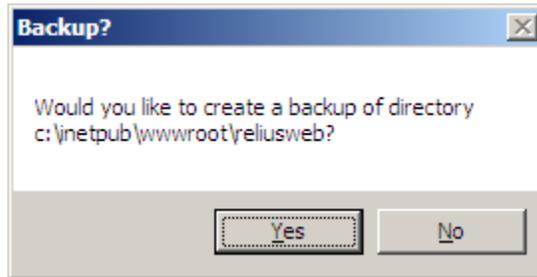
- 5.8 After your database has been verified to be at the correct version, Internet Information Services will stop automatically. Windows may take some time to stop IIS under the installation. Do not interrupt the process.



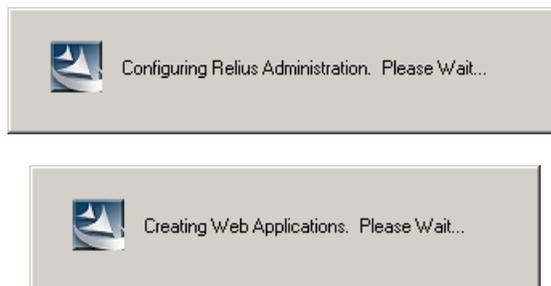
5.9 Files will copy to your server.



5.10 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.



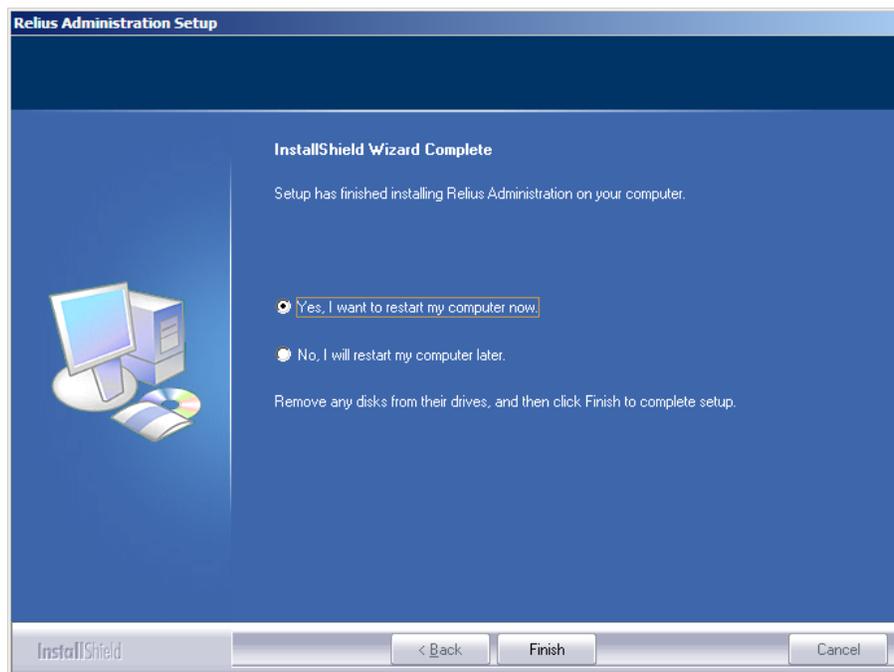
5.11 Relius Administration Web/CSR 20.1 will configure its settings and update the applications.



- 5.12 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.



- 5.13 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.



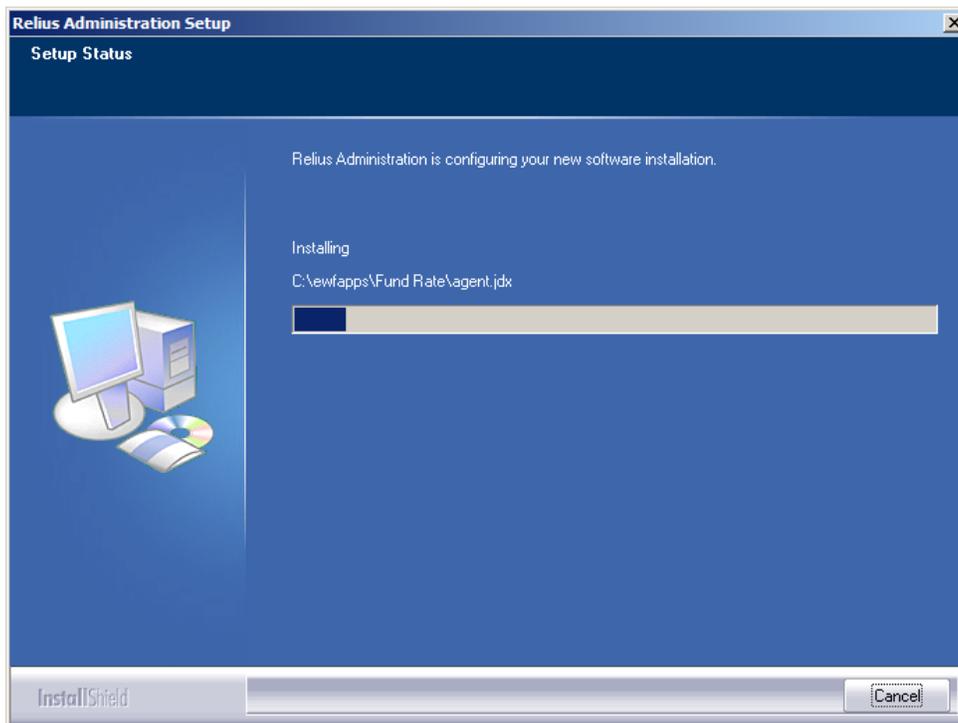
## 6 VRU Installation Specifics

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.



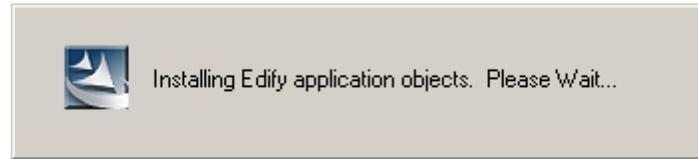
6.2 Files will copy to your server.



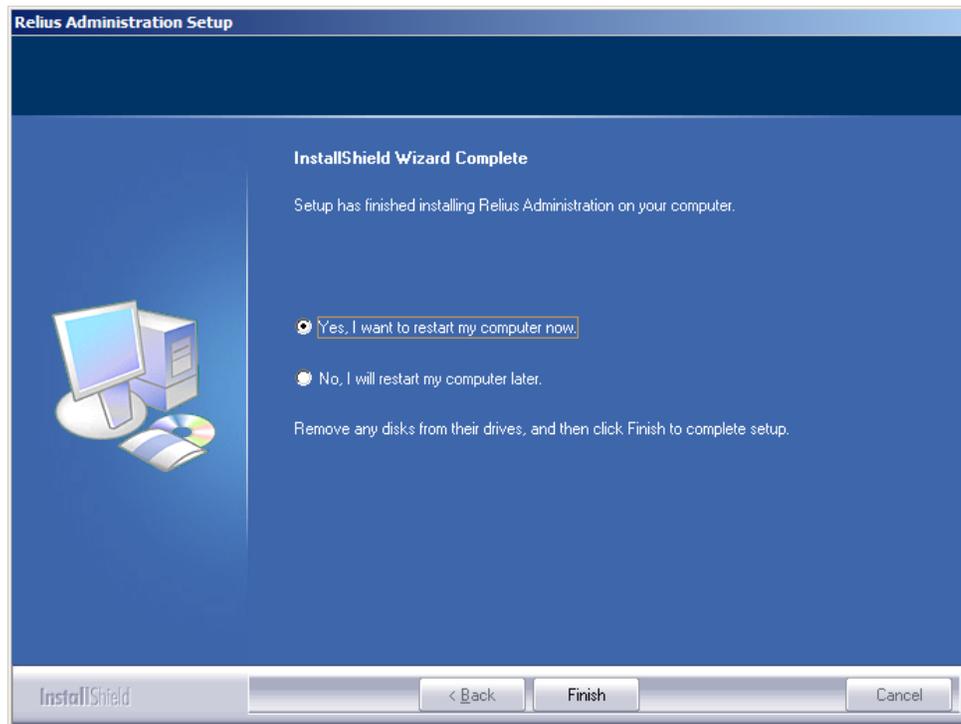
6.3 Relius Administration 20.1 VRU will configure its settings.



- 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.

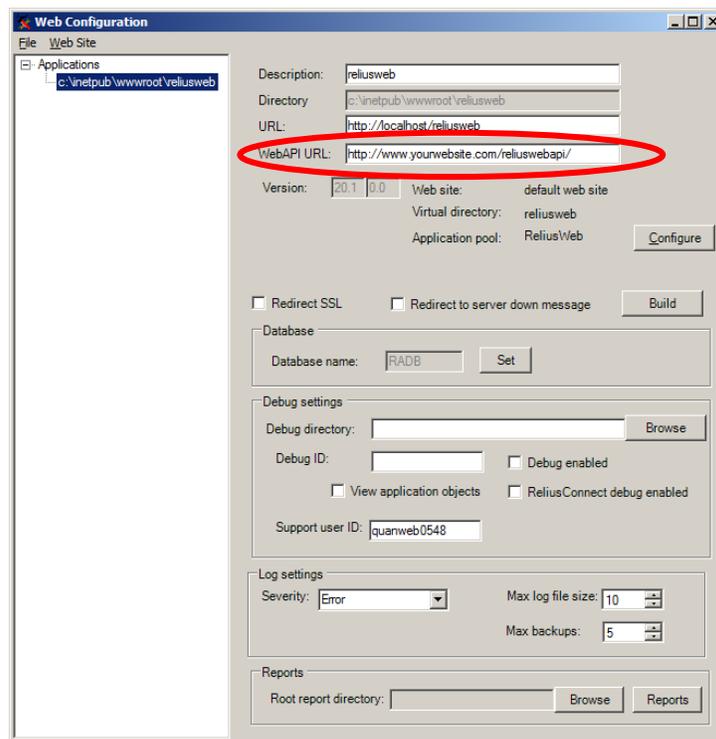


## 7 Setting Up Initial Web Configurations

**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 or make minor adjustments.**

After installing Relius Administration 20.1 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.

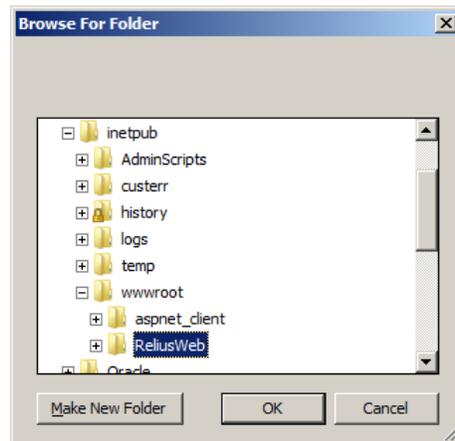
- 7.1 If action was taken in Step 4.3, restore the icons or shortcuts that were temporarily removed. Restart any services that were temporarily set to “Manual” and – if necessary – place them back in “Automatic” mode.
- 7.2 To configure your settings, Click *Start / Programs / Relius / Admin / Web Configuration*. Your Configuration program will look like what you see below. **Note: This program will run “as administrator.”**
- 7.3 Notice an additional field, circled below: **WebAPI URL**. This site will be need to be accessible from outside your firewall. By default, the installation uses the IP address of the web server. However, firewall restrictions may require you to set it to the actual Web address. You may have to work with your network administrator to get the precise settings needed. Edit that field and save your changes.



The screenshot shows the 'Web Configuration' dialog box with the following fields and settings:

- Description: reliusweb
- Directory: c:\inetpub\wwwroot\reliusweb
- URL: http://localhost/reliusweb
- WebAPI URL: http://www.yourwebsite.com/reliuswebapi/** (circled in red)
- Version: 20.1 0.0
- Web site: default web site
- Virtual directory: reliusweb
- Application pool: ReliusWeb
- Buttons: Configure, Build
- Database name: RADB
- Debug settings: Debug directory (Browse), Debug ID, Debug enabled, View application objects, ReliusConnect debug enabled, Support user ID: quanweb0548
- Log settings: Severity: Error, Max log file size: 10, Max backups: 5
- Reports: Root report directory (Browse), Reports

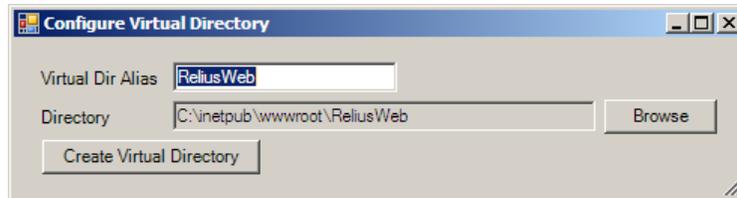
- 7.4 To review or change the settings of a site, choose one of the “Applications” listed on the left side of the Configuration window.
- 7.5 To create an additional web site, click *File / New / Web Site* to create one. Choose the location of your web site files and click *OK*. The default for Web is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



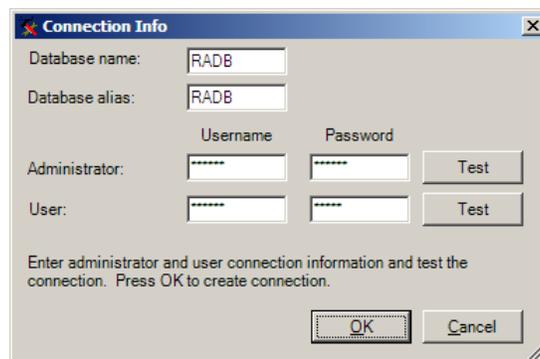
- 7.6 You will be prompted to select an Application Pool. The default is ReliusWeb. **You must use the “Web\_User” account that was generated in Section 3.** Be sure to enter the username and password precisely and click *Save Identity*. Then click *Select*.



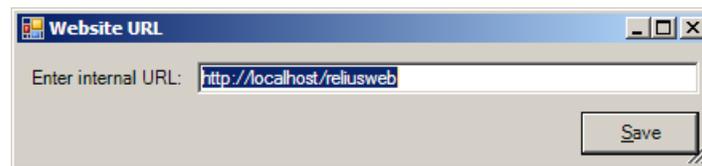
- 7.7 New installations will be prompted for the location and name of the first web site. Ideally, the virtual directory name should match the physical directory name. For example, ReliusWeb and C:\inetpub\WWWroot\Reliusweb. When finished, click *Create Virtual Directory*.



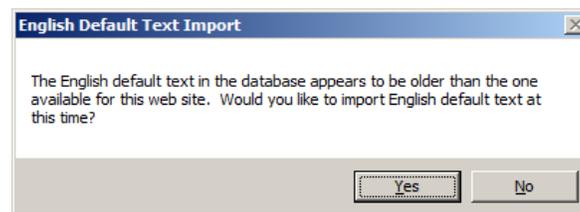
- 7.8 Please note that with the enhanced security measures taking place at version 20.0, you will need to set your database connection strings. For each database on each web site, you will be required to set the “Administrator’s” user name (default `sysadm`) and password, as well as the “User’s” user 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.



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



- 7.10 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.



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

7.12 Click *File / Save*.



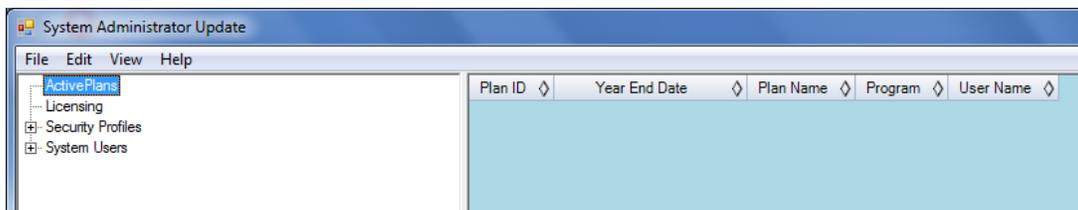
7.13 Repeat this process for each "Application" on each Web server.

## 8 Setting Up Security Profiles and Web Settings

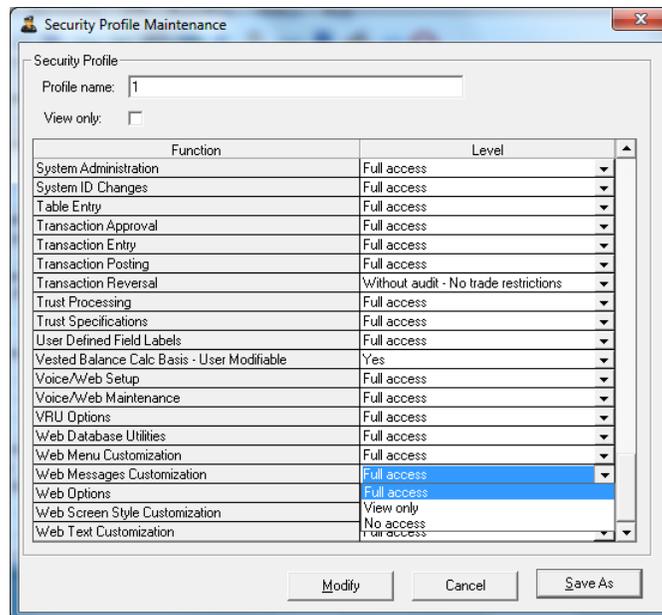
The Steps in this Section will need to be followed by both upgrade and new systems. Security profiles in Relius Administration are constantly fine-tuned. Therefore, you will need to adjust or verify your profiles. The default for new and adjusted profiles is “No Access.” To enable a user for certain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

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

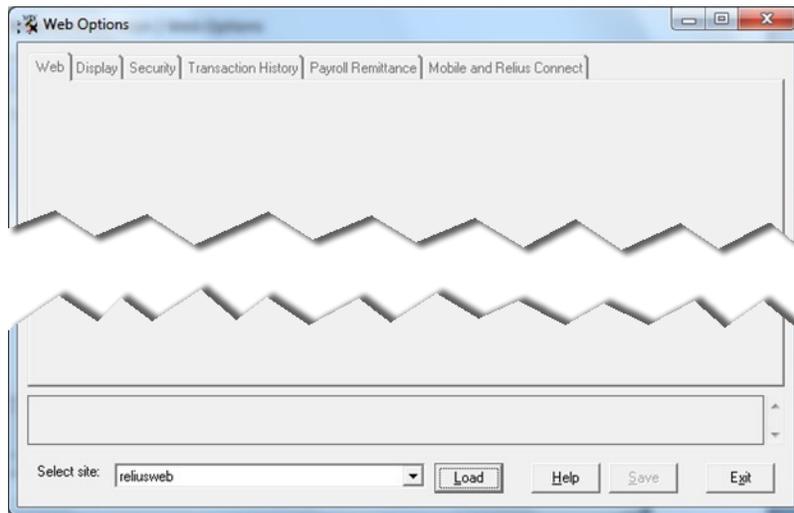
- 8.1 Open Relius Administration and sign on as a user with rights to System Administration. From the main menu, click *Utilities / System Administration / System Administrator Update*.



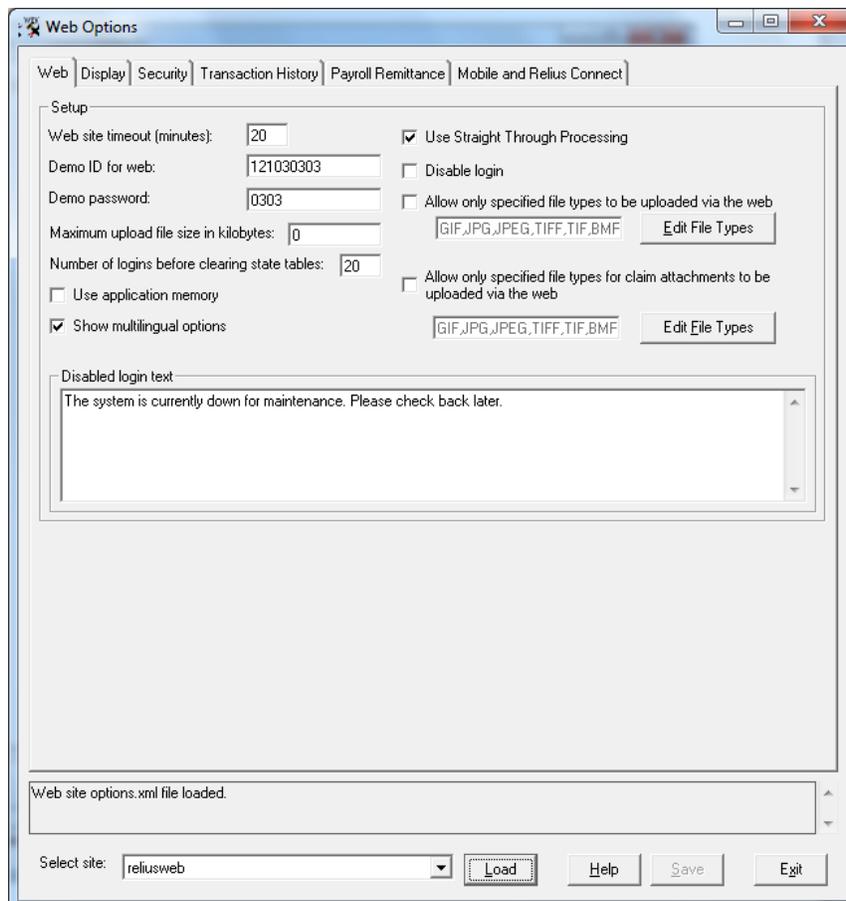
- 8.2 From the System Administration menu, click the “Security Profiles” tree. Double click the profile you wish to edit. Change the level of security (specifically, checking “Customer Service Module,” “VRU Options,” “Web Menu Customization,” “Web Messages Customization,” “Web Options,” and any other 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.



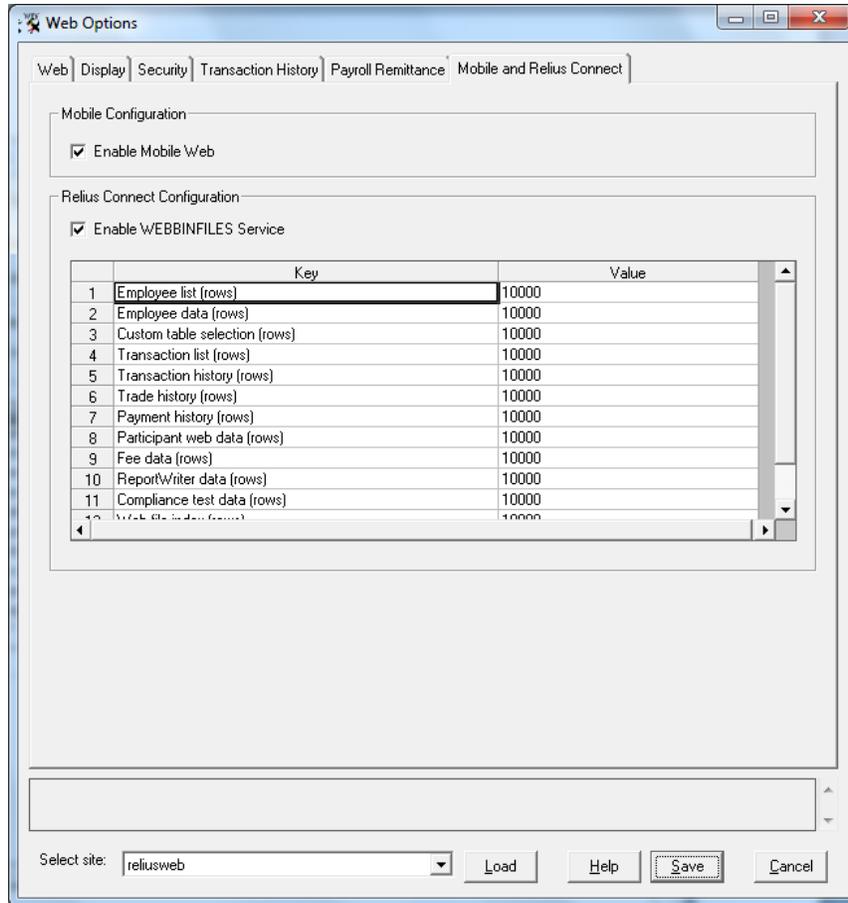
8.3 From the Relius Administration Main Menu, click *Utilities / VRU / Web Administration / Web Options*. Select the site you want to edit from the drop-down and click *Load*.



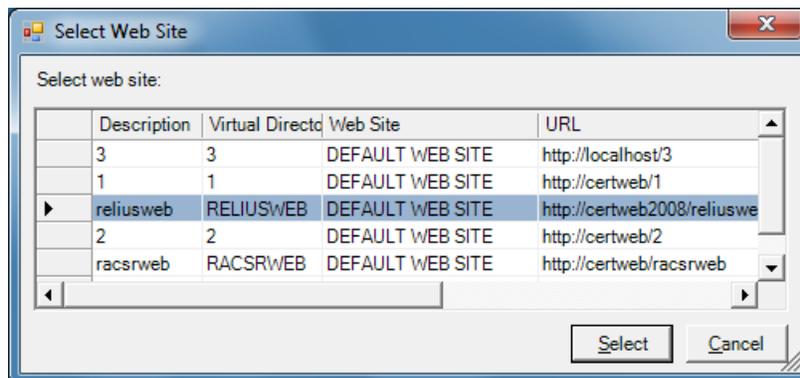
8.4 Make any necessary changes to your site. Be sure to click *Save* to retain your changes.



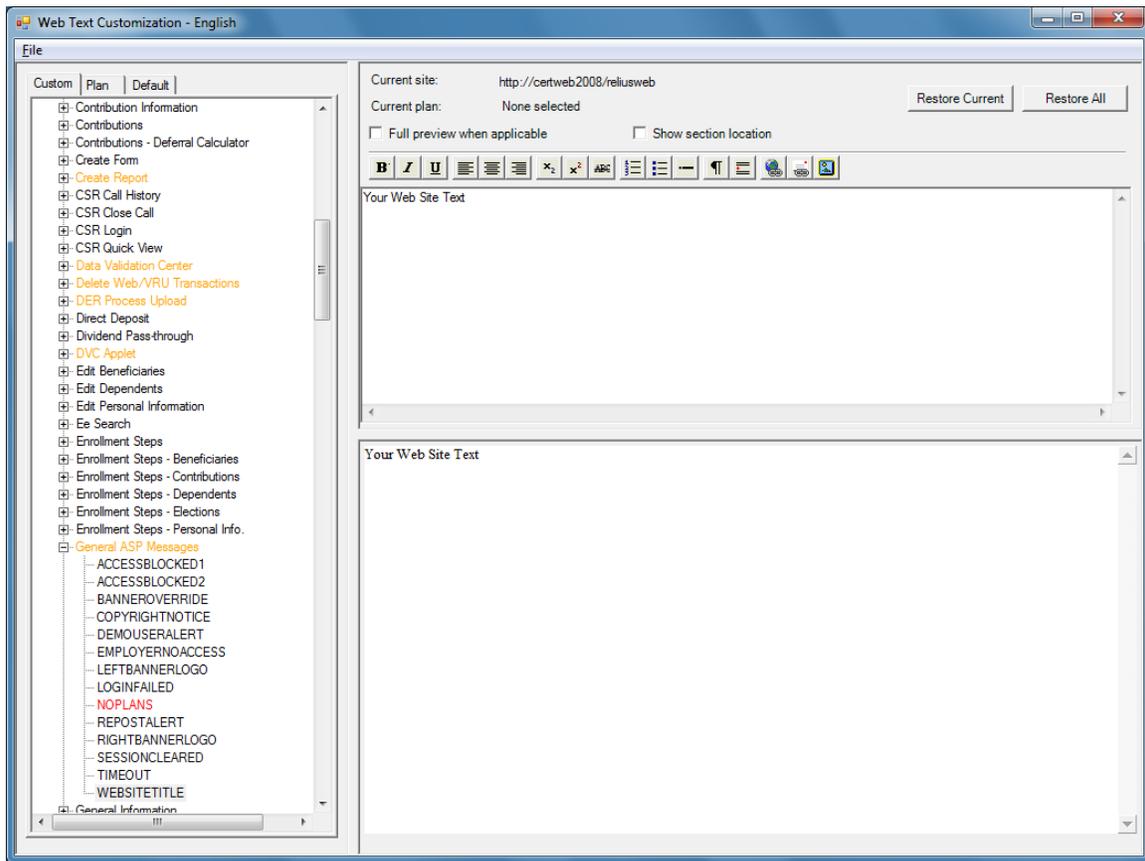
8.5 **Special note for mobile web usage: If you are using Mobile Web and Relius Connect features, you must enable it at the workstation level.** There is no longer the need to change the CONFIG files on the web server. On the “Mobile and Relius Connect” tab, select your options and click *Save*.



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.



- 8.7 Using “tree branch” browsing, select the text you wish to customize. When you have finished, click *File / Save*, then *File / Exit*.



- 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>
  <service behaviorConfiguration="mexBehaviour"
name="Relius.Admin.Web.WebServices.DVC.DVCAPI">
  <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>

  <service behaviorConfiguration="mexBehaviour"
name="Relius.Admin.Web.WebServices.DVC.DVCUpload">
  <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” was installed to record and play back custom voice clips. This job needs an additional step before recording and playback will work.

10.1 With Edify “up,” open the “Relius” application object window.

The screenshot displays the Workforce Administrator interface. On the left is a tree view of the Electronic Workforce structure, including components like AgentSSO, CiscoCMSS, COMSSO, CTCLIENTSS, DatabaseSSO, ImageSS, NTCommandSS, NTDLLSS, SOAPClientSSO, TELEPHONYSSO, Terminal, WEBSSO, and Application Object Folders. The main area is divided into several panels:

- Node View:** A grid of system status cards for various components:
 

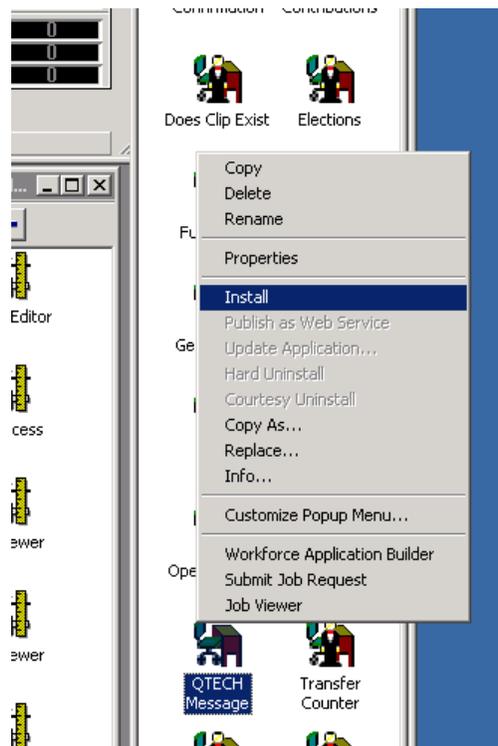
<b>AgentSSO</b> STATUS: UP ALERT: [Green Bar] # Availat: 4 # In Use: 0 # Down: 0	<b>CiscoCMSS</b> STATUS: DISABLED ALERT: [Green Bar] # Availat: 0 # In Use: 0 # Down: 0	<b>COMSSO</b> STATUS: UP ALERT: [Green Bar] # Availat: 4 # In Use: 0 # Down: 0	<b>CTCLIENTSS</b> STATUS: DISABLED ALERT: [Green Bar] # Availat: 0 # In Use: 0 # Down: 0	<b>DatabaseSSO</b> STATUS: DISABLED ALERT: [Green Bar] # Availat: 0 # In Use: 0 # Down: 0	<b>ImageSS</b> STATUS: DISABLED ALERT: [Green Bar] # Availat: 0 # In Use: 0 # Down: 0
<b>NTCommandSS</b> STATUS: DISABLED ALERT: [Green Bar] # Availat: 0 # In Use: 0 # Down: 0	<b>NTDLLSS</b> STATUS: DISABLED ALERT: [Green Bar] # Availat: 0 # In Use: 0 # Down: 0	<b>SOAPClientSSO</b> STATUS: DISABLED ALERT: [Green Bar] # Availat: 0 # In Use: 0 # Down: 0	<b>TELEPHONYSSO</b> STATUS: UP ALERT: [Green Bar] # Availat: 8 # In Use: 0 # Down: 0	<b>Terminal</b> STATUS: DISABLED ALERT: [Green Bar] # Availat: 0 # In Use: 0 # Down: 0	<b>WEBSSO</b> STATUS: DISABLED ALERT: [Green Bar] # Availat: 0 # In Use: 0 # Down: 0
- Subsystem View (TELEPHONYSSO):** A Resource Summary table:
 

Total # Lines	# Down Lines	# In Calls
4	0	0
# Out Calls	Total # In Calls	Total # Out Calls
0	0	0
Av In Call Time (sec)	Av In Answer Time (sec)	Av Out Call Time (sec)
0	0.000	0
# Fax Sent	# Fax Received	
0	0	
- Resource List:** A table showing individual resource status:
 

Resource Name	Resource State	Last Action Time	ApplicationObject;JobID;TrnID;...
INLINE.000_8	Online	06/18/2015 1:59:26 PM	
INLINE.001_8	Online	06/18/2015 1:59:26 PM	
INLINE.002_8	Online	06/18/2015 1:59:26 PM	
INLINE.003_8	Online	06/18/2015 1:59:26 PM	
LINE.000_8	Online	06/18/2015 1:59:26 PM	
LINE.001_8	Online	06/18/2015 1:59:26 PM	
LINE.002_8	Online	06/18/2015 1:59:26 PM	
- Application Object Folders:** A vertical list of application objects including Acc't Menu, Answer, Balances, CEB, Confirmation, Contributions, Does Clip Exist, Elections, Fund Rate, Gen Info, Get Balance Data, Loans, Main, Menu, Operator Xfer, Pin Change, QTECH Message, Transfer Counter, Transfers, and Withdrawals.

The status bar at the bottom indicates "Local node is UP".

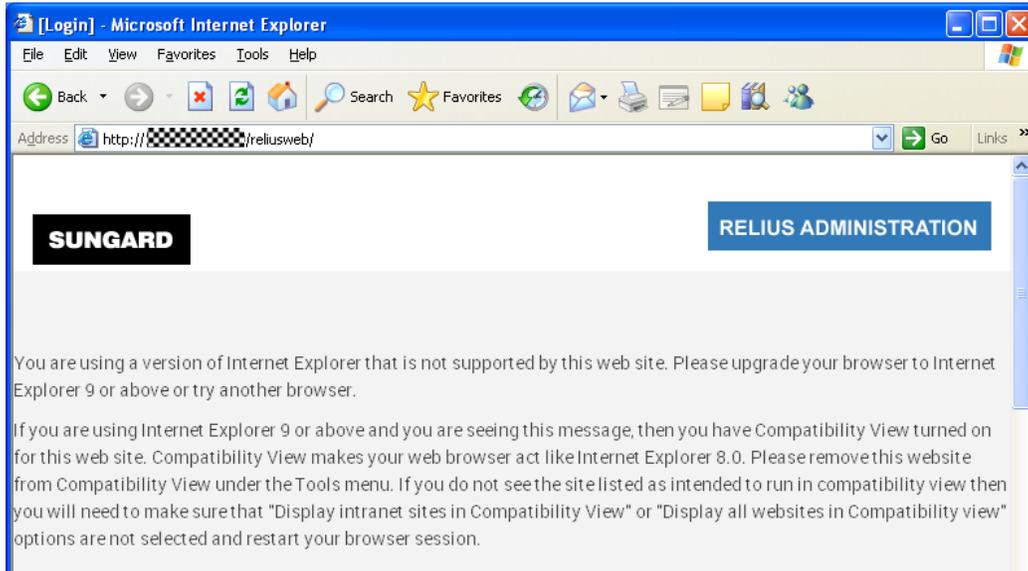
10.2 Right click the “QTECH Message” job and choose “Install.” The “man” will appear at the desk.



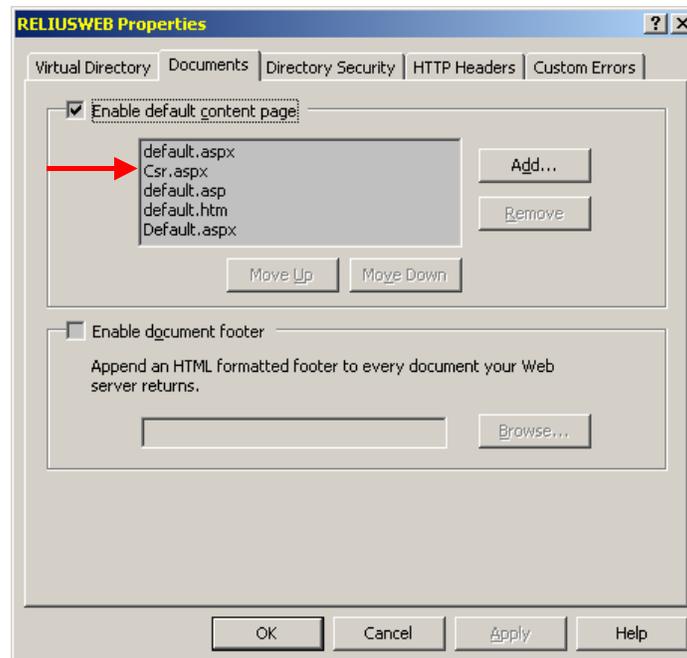
10.3 You will now be able to record and play custom voice clips.

## 11 Testing the Servers

- 11.1 Workstations accessing CSR must have Microsoft Internet Explorer 9.0 or higher. Please note that earlier versions of Internet Explorer are no longer supported.



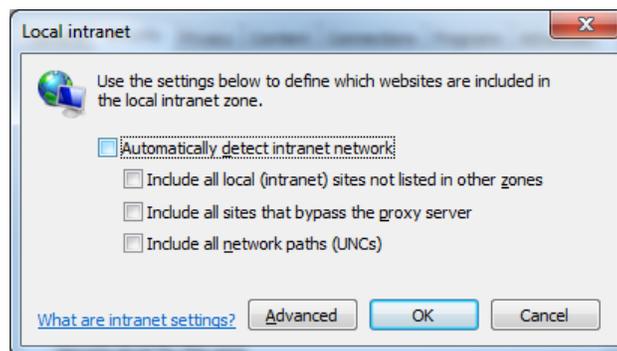
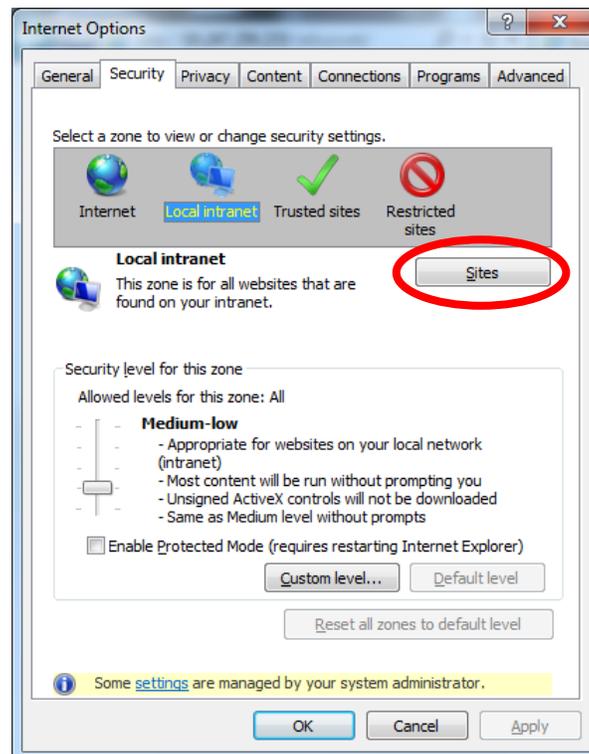
- 11.2 Web servers can now be set to use the same “site” for both Web and CSR – <http://yourweb/reliusweb/csr.aspx>. You may have to adjust IIS at the Web Server by adding Csr.aspx to the ReliusWeb Virtual Directory’s settings and placing it second only to Default.aspx.



- 11.3 Log on to the Web/CSR Server using the URL assigned to it (i.e., <http://yourweb/reliusweb/>). 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 9 or higher – even when IE9 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 Architecture Changes & Troubleshooting

The Relius Administration Web product has received a complete overhaul, and not just appearance. Now it uses an Application Programming Interface (API) and a Representational State Transfer (REST) service to transfer data from the database to a readable format for users and participants. This section should provide the advanced user and outside technology consultant with necessary information to make proper decisions and configuration adjustments suitable to a client's individual environment.

### Definitions

According to Wikipedia:

“A Web API is a development in Web services where emphasis has been moving to simpler representational state transfer (REST) based communications. ... REST gives a coordinated set of constraints to the design of components in a distributed hypermedia system that can lead to a higher-performing and more maintainable architecture.”

What this means is that the complete rewrite of Relius Administration Web began at the foundation. To enhance the users' experience while providing increased performance, the design and development of the Web product had to use a multi-tiered, scalable architecture. Many calls to the database now take place through this API/REST Service, rather than through traditional HTTP (web page) calls.

### File & Folder Structure

To accommodate the new design, a second “web site” has been installed to your system. The default name for the site is ReliusWebAPI. If you wish to change the name, you can do so during the installation process (See Steps 5.3 and 5.4). However, SunGard Relius recommends that the name coincide with the existing site. For example, if your main site is called “RetireWealthy,” your API/REST Service site should be called “RetireWealthyAPI.” This will differentiate the two sites but keep the naming conventions consistent.

The files contained in the API site are going to be vastly different than what is in our traditional Web sites. This is normal. **Do not combine the two sites**, as they serve very different purposes. You cannot “browse” to the API site, either. Since it doesn't use traditional HTTP files, there is nothing to “see” once it's installed and configured. The Web site will interact with the API site in the background.

## Application Pools

For each new API site, you will need an additional Application Pool. The default is ReliusWebAPI. The settings for this AppPool will be different than your current Web AppPools, so it needs to be distinct. The specific differences from the original AppPool improve performance of the WebAPI and are listed below:

- Under *Process Model*, the *Idle Time-Out* is set to 0.
- Under *Recycling*, the *Regular Time Interval* is set to 0 and *Recycle* is set at a time interval of 2:00 a.m.

These settings aid in performance by preventing lag times after the AppPool has sat idle and by recycling the AppPool only at 2:00 a.m. every day. You can use the same Relius Web user account to manage this AppPool. However, if you wish to configure it with a different user account, it must have the same criteria as the original user. See Step 2.11 for additional information.

## Kick-Starting the WebAPI

A special application has been created to “warm up” the application pool for ReliusWebAPI. This application is not necessary for your system, but it may aid in speeding up the first user’s login and response time.

LoadWebApplication.EXE is in the primary program file location, normally C:\Program Files (x86)\Relius\Admin. It is accompanied by a text file, LoadWebApplicationRequests.Txt, that needs to be adjusted to suit your particular web site. See the sample below:

```
http://YourWebSite/ReliusWebAPI/ConfigSettings/RA.GetOneConfig(settingName='PersonalDataDisplay|Home_e-mailEdit',planId='YourPlanID',yrEndDate=2015-01-01,sSNum='')
```

Copy the text file to a location where you can edit and save the changes. Adjust the following areas that will reflect your environment:

YourWebSite/ReliusWebAPI	Insert the web address of the WebAPI site (see Step 6.3)
YourPlanID	The Relius Administration Plan ID that you would like to use as a “test case”
2015-01-01	The most recent year-end date of that “test case” Plan

If you have additional WebAPI sites (see next section on “Additional API Sites”), you will need additional lines in the text file, one for each WebAPI site.

When you have edited and saved the file, copy it back into the program file location, and then run LoadWebApplication.EXE **As Administrator**. You may get an error that states in part “(401 Unauthorized.” This is normal and expected. Your WebAPI Application Pool has been “warmed up.”

## Additional API Sites

If you have additional Web sites, you can use the same single API site, **provided they all attach to the same database**. If, however, your additional Web sites connect to a different Oracle database, you will need to set up API sites for each additional database connection. The process to set this up is currently manual. Please call Relius Technology Support for instructions.

## Additional Memory & Drive Space

Because of the increased architecture of the Relius Administration Web product, systems will need to be running a **minimum** of 4 GB of RAM. A standard server purchased today should normally start with 16 GB. Extra drive space may also be required. Each API site, while not excessive, takes a little less than the original Web site. Plan accordingly.

## API Configuration File

Each Web site in IIS contains a configuration file (Web.CONFIG) that is the foundational piece for the individual site. It is a basic text file set to XML format. Each will be different based on how the site was built. That's why it is imperative that the ReliusWeb and ReliusWebAPI sites are not combined but completely kept separate. The default settings have already been arranged for you. If your environment requires adjustments to the file, there are three settings to change: database name, log file location, and log severity.

To make changes, copy the file to a location where you can edit the file and save changes. In its default location, the file is protected from being edited. Then, open it in Notepad or other text-editing program (Note: **Do not** use a rich-text editor, such as Word or WordPad, as you risk changing the plain text to a format that may cause errors.). Adjust **only** the three highlighted areas below. Be careful to avoid changing format or special characters. When you have finished making the changes and saving the file, copy it back to the original location (**overwrite only**, do not rename or make copies in the ReliusWebAPI folder).

```
<applicationSettings>
  <RAWebRESTService.Properties.Settings>
    <setting name="DatabaseName" serializeAs="String">
      <value>RADB</value>
    </setting>
    <setting name="DebugPath" serializeAs="String">
      <value>C:\QTTEMP</value>
    </setting>
    <setting name="LogSeverity" serializeAs="String">
      <value>E</value>
    </setting>
  </RAWebRESTService.Properties.Settings>
</applicationSettings>
```

The parameters for “LogSeverity” are:

N	None	Indicates that no logging of any entries will be performed. This is not applicable to a log message.
F	Fatal	Indicates a fatal-level message or that fatal level and higher level messages will be logged.
E	Error	Indicates an error-level message or that error level and higher level messages will be logged.
W	Warning	Indicates a warning-level message or that warning level and higher level messages will be logged.
I	Information	Indicates an information-level message or that information level and higher level messages will be logged.
D	Debug	Indicates a debug-level message or that debug level and higher level messages will be logged.
A	All	Indicates that all messages will be written to the log regardless of the messages indicated severity level.

Setting your LogSeverity to I, D, or A will consume disk space rapidly. Use those levels with caution and be sure to reset the parameter when your troubleshooting is completed.

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