SUNGARD RELIUS DOCUMENTS

Relius Documents PC
Version 4.0
Installation and Configuration

November 7, 2006

Table Of Contents

1	Overview

A new, consolidated instruction manual has been compiled for you. This document covers both new installations and upgrades from Relius Documents PC 3.8 or higher. Additionally, the instructions contained in this document are used for standalone and networked workstations. Since this style of technology documentation is different than what most RDPC clients are accustomed to seeing, please forward any feedback to Relius Technology Documentation. The e-Mail address is tech.docs@relius.net.

The installation of the RDPC database server is detailed in a separate document.

The installation of RDPC consists of the following basic procedures:

1) Read and understand the entire document.

2) Back up your system and database.

3) Install and configure RDPC 4.0.

4) Convert your existing database or create a new, blank database.

2	Installation and Environment Considerations

2.1 Hardware Requirements & Supported Operating Systems

All hardware requirements are specified on our web site (http://www.relius.net/support/qt_technology.asp). Once you are logged on to the support site, click the "Documents 4.0 Hardware Requirements" link.

The only supported operating systems for RDPC workstations are Windows 2000 Professional with Service Pack 4 or higher and Windows XP Professional with Service Pack 2 or higher. (Network systems: Windows Server 2003 with Service Pack 1 and Windows 2000 Server with Service Pack 4 are supported for hosting your RDPC networked database.) All other operating systems will cause the installation to fail. SunGard Relius cannot guarantee "workaround" scenarios for workstations, regardless of whether they work in the short term.

2.2 Software Considerations

Microsoft .NET is an application used by the customized installation of the RDPC. Microsoft .NET 2.0 is included in this installation. More information on Microsoft .NET can be obtained from Microsoft Windows update (http://www.windowsupdate.com/).

If not already installed, Microsoft Windows Installer 3.1 will also be placed on your systems to allow for a smooth installation of RDPC.

2.3 Program File Location

The standalone installation of the RDPC will default to C:\Program Files\Relius\Docs. Networked installations will need to change the location to a consistently mapped drive and path across the enterprise so the same drive letter and path will be available to all users. SunGard Relius strongly recommends allowing the defaults to remain in place.

2.4 Installation Methods

RDPC is only available via download from the SunGard Relius web site. Downloading the file to a local hard drive is recommended and supported. Other methods of installing (network volumes, "push" or "ghost" technology, Z.E.N. Works, Zip Drives, etc.) are not supported or recommended. If a network drive is used to install the software, it must be mapped with a drive letter assigned. Running the SETUP.EXE from a volume accessed by browsing with Network Neighborhood will **fail**. Dial-up clients need to contact Relius Technology Support before attempting a download.

2.5   Virtual Environments

The use of virtual environments and connections, such as Microsoft Virtual Server or VMWare, are not supported by SunGard Relius. If a virtual environment is detected, the installation will abort. For additional technical information regarding this topic, please contact Relius Technology at 1-800-326-7235.

2.6   Software fixes and documents via Internet

Fixes, support files, language updates, and updated documentation are distributed via the web at http://www.relius.net/support/loginform.asp. Users must have Internet capability to receive these updates. Once you have logged on, click the "Technology" link to browse the list of available material. You can click *"Subscribe"* (http://www.relius.net/support/subscribe.asp) to receive notification of new fixes by e-mail. SunGard no longer sends patches, updates, notifications, and update documentation through the mail, and we strongly urge all users to subscribe to this service.

2.7   Virus Scanners

Although SunGard Relius does not endorse, support, or recommend any particular method, virus protection is encouraged on servers and workstations. The two most popular are Symantec's Norton Anti-Virus and McAfee VirusScan by Network Associates. You should update your virus definition files regularly. Some virus scanners – if active during the installation – can interfere with a successful installation. Symptoms include an error message stating that a file cannot be overwritten. Temporarily disable virus scanning before starting the installer. Clients using Norton with Script Blocking turned on should test the functionality of RDPC to determine whether script blocking is affecting the application.

2.8   Security Considerations

Responsibility for support of problems and issues related to RDPC running in a locked-down security configuration is that of the end user. Certain circumstances may require billing on a time and material basis for troubleshooting. SunGard Relius cannot guarantee that RDPC will install or operate properly on any given locked-down security configuration. RDPC is certified and supported only when run on the default Windows security settings. The local Windows Administrator (or a user with equivalent Administrator rights) **must** run the installation.

2.9   Networked Database Server Information

Clients using a networked environment will be required to convert their database from Gupta to one of three varieties of Microsoft SQL: SQL Server Express (Default), SQL Server 2000, or SQL Server 2005. SunGard Relius provides clients with SQL Server Express, as well as instructions on the installation and maintenance of SQL Express systems. The other two editions of Microsoft SQL are the responsibility of the clients. Contact Relius Technology Support before installing SQL Server 2000 or 2005.

3	Performing the RDPC Installation

Pre-Installation Notes:

    a) Be sure no screen saver will become active during the installation. SunGard discourages the use of screen savers whenever running RDPC or its Installer.

    b) The installation process takes approximately **1 hour** or less to complete. In testing the release at SunGard Relius, very large databases requiring upgrades have taken less than 1 hour to complete.

    c) Review the RDPC system requirements located on our web site (http://www.relius.net/support/qt_technology.asp). **Do not** proceed with the update if your environment does not meet the minimum system requirements.

Unless otherwise noted, all activities contained herein must be directly conducted at the RDPC "Admin" workstation. (All Standalone workstations are considered "Admin" workstations. In networked environments, the "Admin" workstation is the computer used to install the RDPC files to the file server.)

3.1   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.

    Additionally, programs that are set to launch when Windows is started can also be specified in C:\WINDOWS\WIN.INI. Please **edit** this file using Notepad. Temporarily **remark** the entries **RUN=** and **LOAD=** by placing a semi-colon **(";")** in front of the line (if programs are specified), then **Save** and **Exit** the WIN.INI file. Example of remark:

        ;RUN=EXAMPLE.EXE

3.2   Re-start the computer. Windows or other programs may have locked some files that need to be overwritten during the update process.

3.3   Temporarily disable all virus protection.

3.4   Download the RDPC 4.0 Installation from the SunGard Relius web site (http://www.relius.net/Support/Loginform.asp) and copy it to a temporary location on your workstation, such as D:\Temp.

3.5   Click *Start | Run*, then type in **D:\Temp\RDPCv40Setup.exe** (where D:\Temp is the location of your downloaded file), and click *OK*.
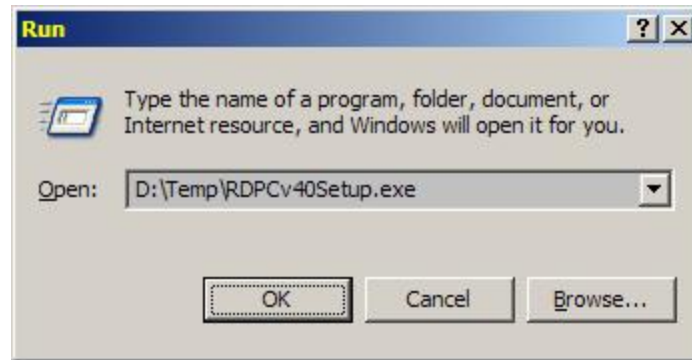
3.6   The installation program will copy the necessary temporary files.
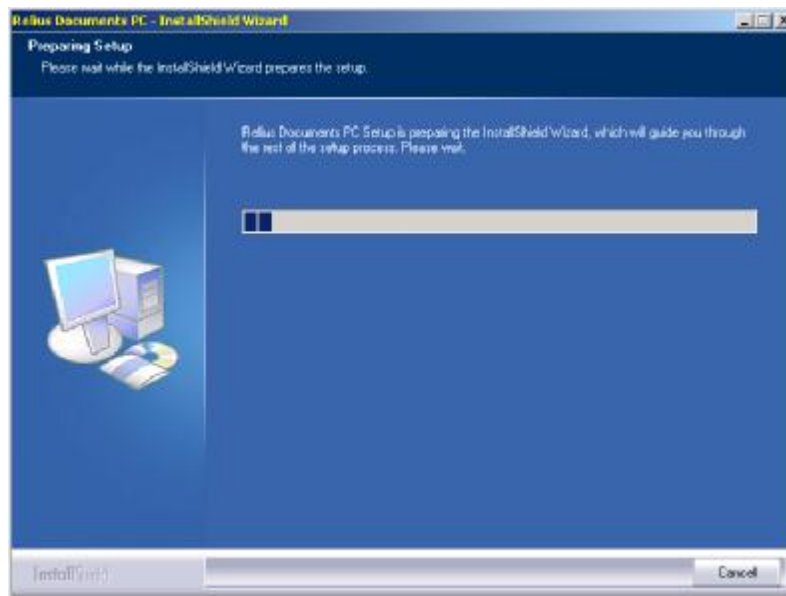
3.7   If installing from a network operating system, such as Windows Server 2003, you will receive this message. This installation must be run from Windows 2000 Pro or Windows XP only. For information about installing RDPC to a terminal server, please contact Relius Technology Support.

3.8 Networked systems that are upgrading from RDPC 3.8 or higher will see this message. Please make sure you have installed and configured your Microsoft SQL Server and verified that it is on-line and ready to connect.

3.9 The "Important Update/Install Information" screens will inform you of all the programs that will be installed or updated. When you are ready to proceed, click *Yes*.

3.10 New installations of RDPC will see the next several screens. Upgrade installations will skip to Step 3.15. Enter your Client ID provided by SunGard and click *Next*.
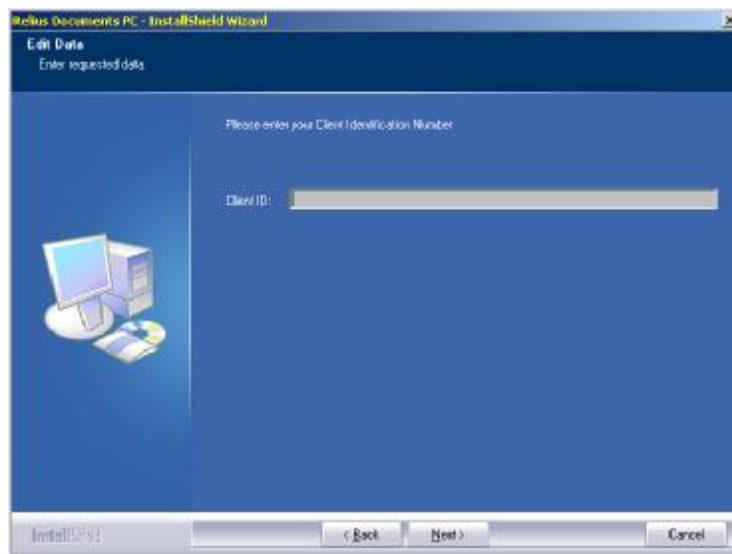
3.11   Enter your user and company information, as well as the Serial Number provided by
        SunGard. When finished, click *Next*.
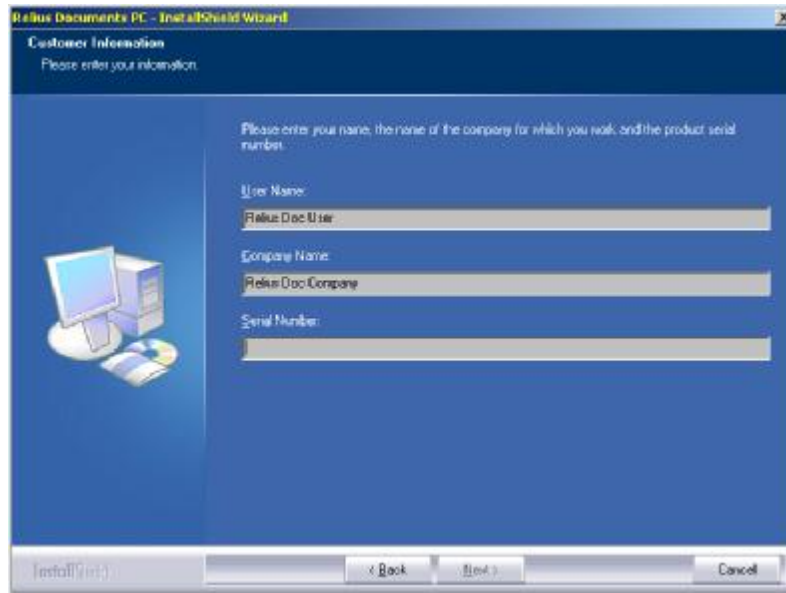
3.12   Choose the type of installation for your environment. Networked systems require the
        RDPC database server (SQL Server Express or SQL Server) to be installed and on-line
        before proceeding.
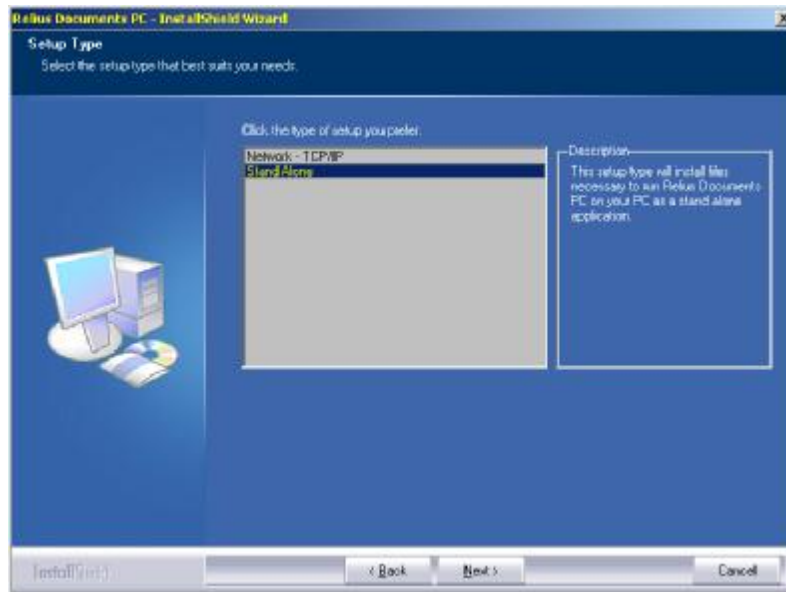
3.13   If installing to a network environment, enter the appropriate information for connecting to your database server. **Please note: Case-sensitivity varies between servers. You must ensure correct case when entering the password and database name.** SQL Express is provided by SunGard Relius under a separate installation. SQL Server is for advanced or enterprise clients. New installations will continue with Step 3.12. Upgrade installations will skip to Step 3.15.
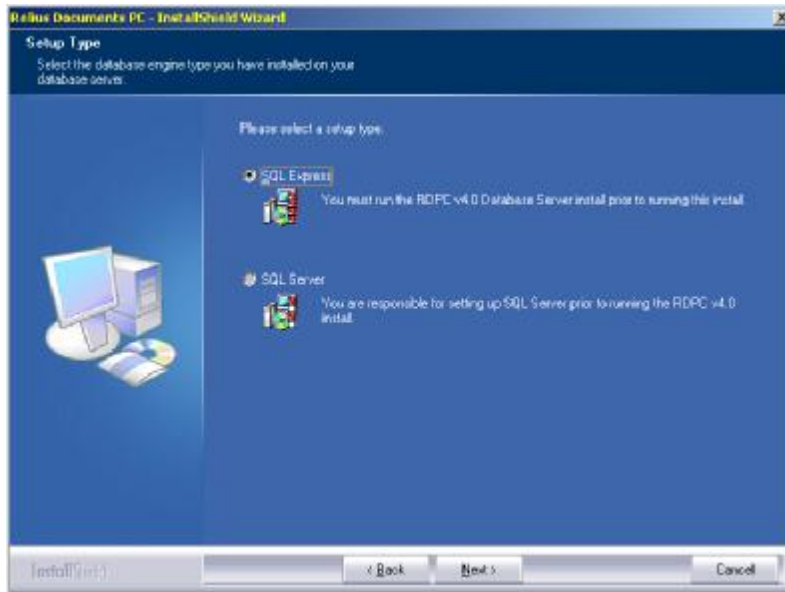
If you chose SQL Express	If you chose SQL Server
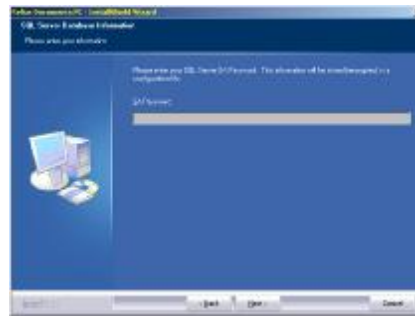
3.14   Choose "Typical" if you want to use the standard installation parameters. To customize
        your installation, choose "Custom" and click *Next*.
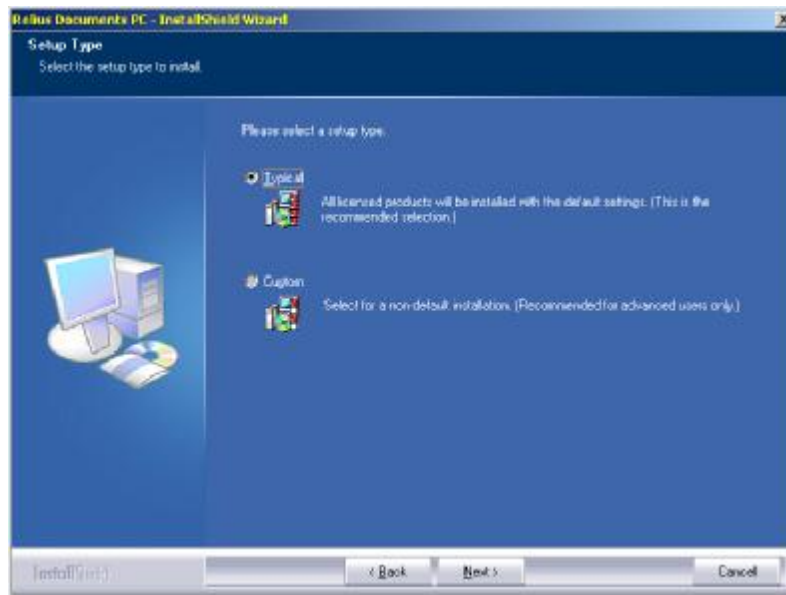
3.15   If installing to a network environment or you chose "Custom" installation, you will be
        prompted for a file location. Network users need to be consistently mapped (i.e., using
        the same drive letter and path) across the enterprise, so file locations will work at every
        workstation. Failure to do so will result in licensing errors.
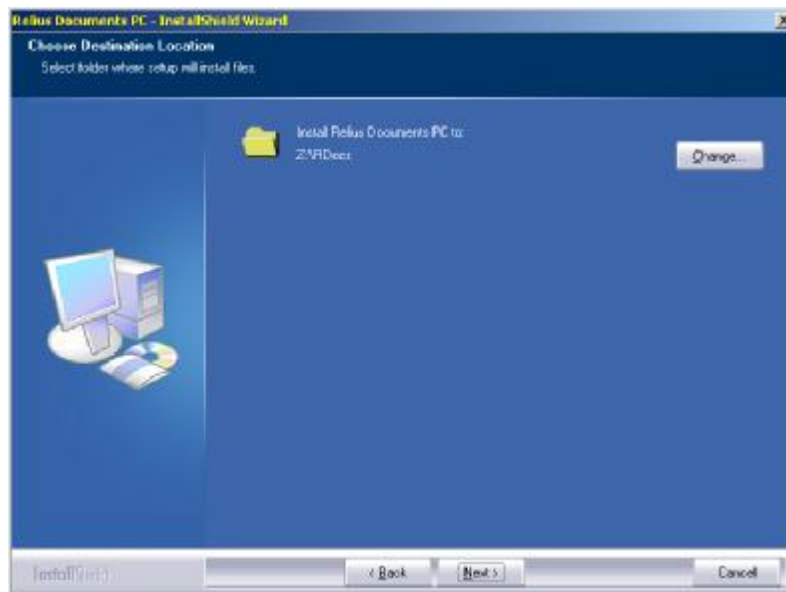
3.16   You will need to confirm your installation settings before proceeding. Any desired changes must be made before clicking *Next* on this screen.
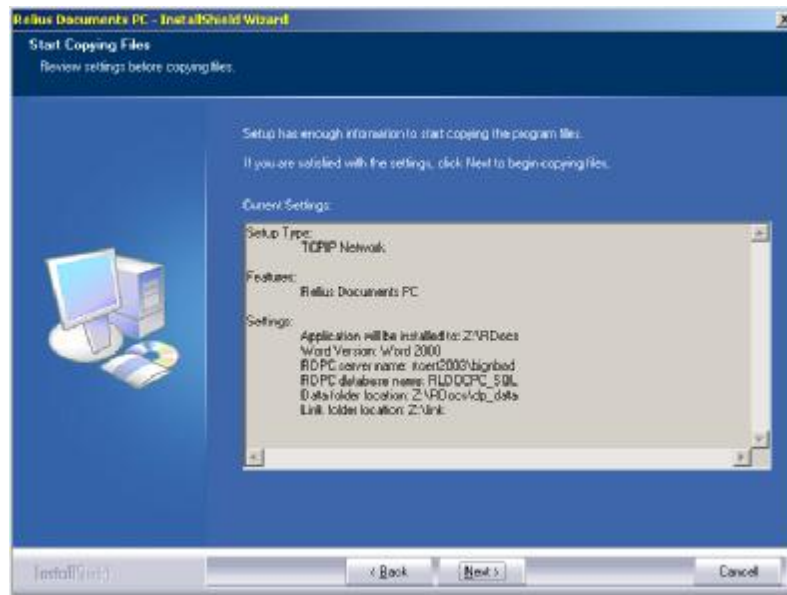
3.17   If not already installed, you will need to read and agree to the End-User License Agreements for Microsoft Data Access Components 2.8. Click *Yes* when you are ready.
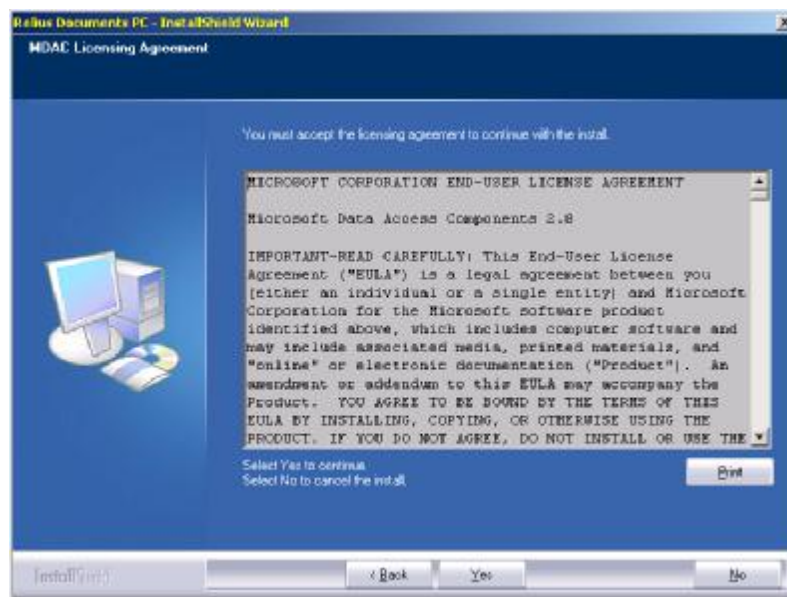
3.18   MDAC will then install automatically. Do not interrupt. (On slower systems, the message below might not appear in the foreground. Use **<Alt>** + **<Tab>** to view the message.)

MDAC 2.8 installing. This will take several minutes. Please DO NOT interrupt this process.
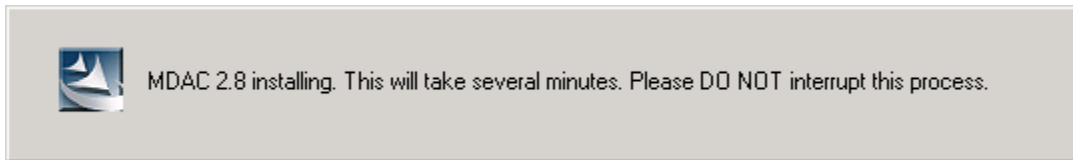
3.19   At the "Welcome" screen, click *Next*.
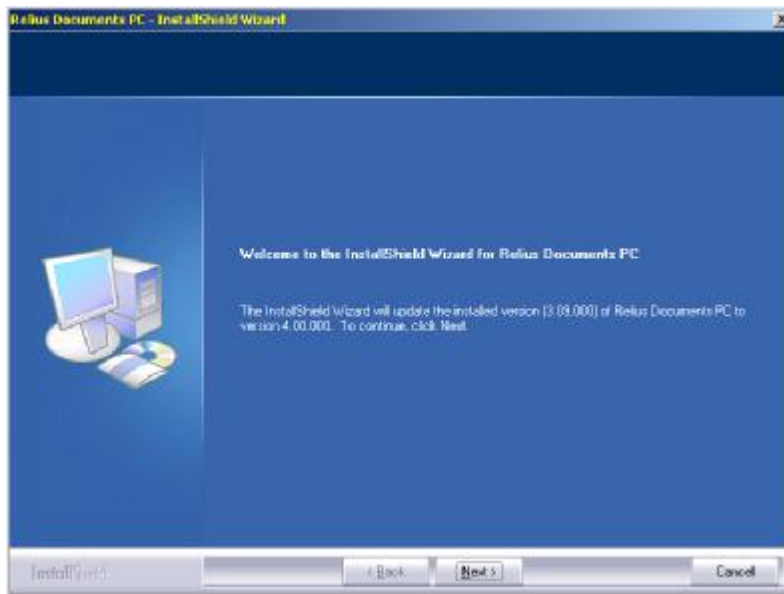
3.20   If not already installed, Microsoft .NET 2.0 requires that you read and agree to the End-User License Agreement. Once you have read the entire text, click *Yes* to continue.
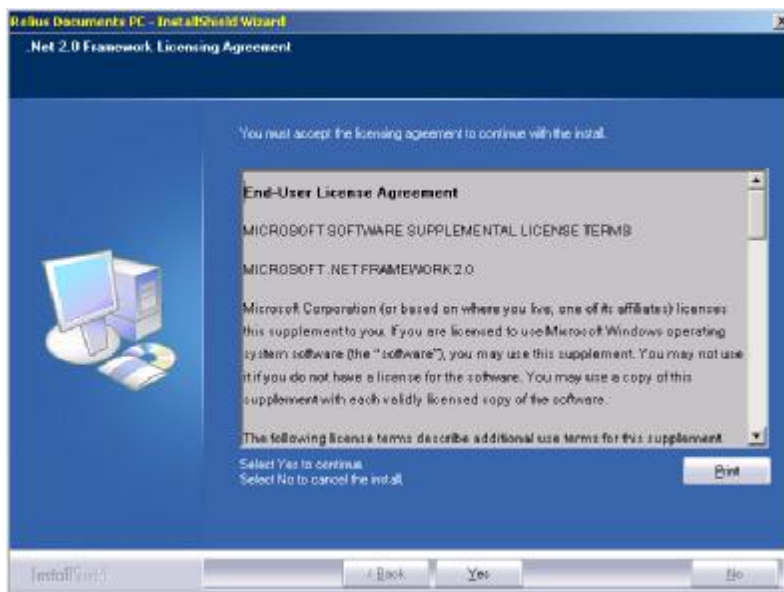
3.21   The installation of .NET will proceed without any further intervention. This process may take several minutes. Do not interrupt the process.

Microsoft .NET Framework 2.0

Extracting   netfx.msi

Cancel

.NET Framework v2.0.50727 Setup is running. This will take several minutes. Please DO NOT interrupt this process.
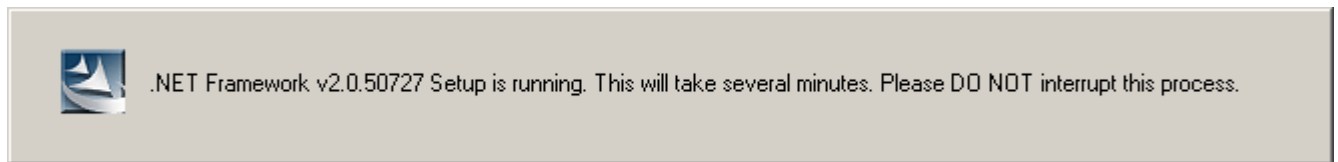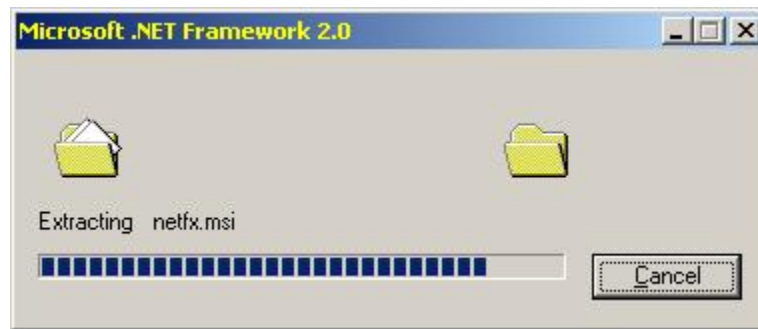
3.22   Upon completion of .NET, Crystal Reports for .NET will install. Do not interrupt.

Crystal Reports for .NET Framework 2.0 (x86)

Cancel

Installing Crystal Reports files...
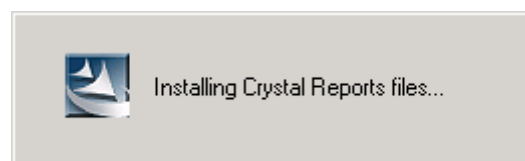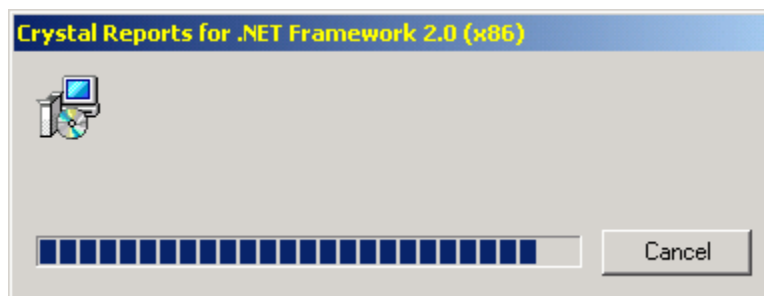
3.23   MSSQL Express installation will begin without intervention on standalone systems. This
        process may take several minutes. Do not interrupt.
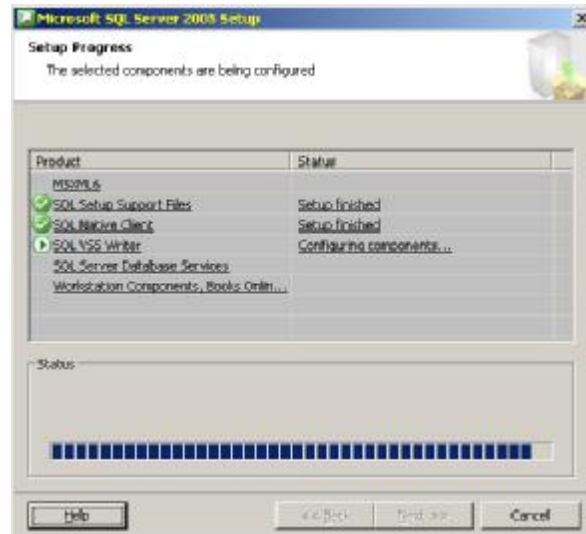
3.24   When the installation of MSSQL Express is complete, program files will be copied to
        your workstation and configuration files will be updated. Do not interrupt.
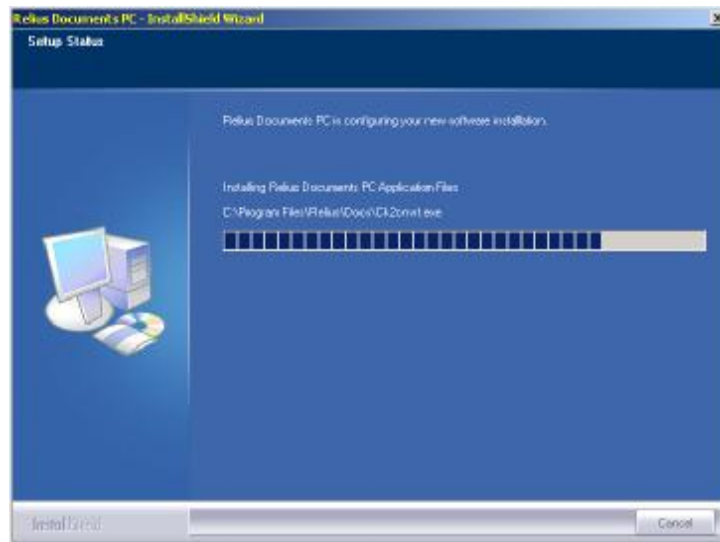
3.25   Your database information will be displayed before conversion. Information will vary,
        depending on the configuration of your workstation, server, and databases. Click *OK*.

3.26   Existing users will convert their database. New users will receive a blank, ready-to-use
        database.

3.27   New networked installations will see this screen. It is a reminder to confirm that all
        subsequent networked installations have consistently mapped drives. See Appendix A.
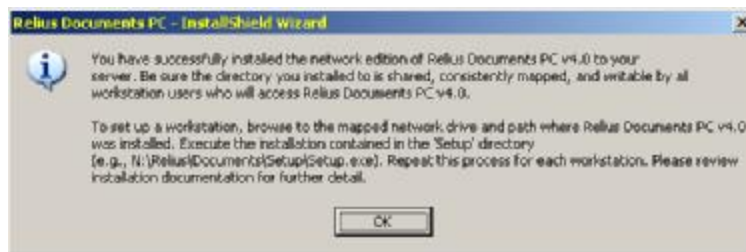
3.28   When the installation is finished, you will be prompted to restart your workstation. **Be
        sure** *"Yes, I want to restart my computer now"* **is chosen and click** *Finish*. Your
        workstation will shut down all applications and restart. **Do not** interrupt the process.
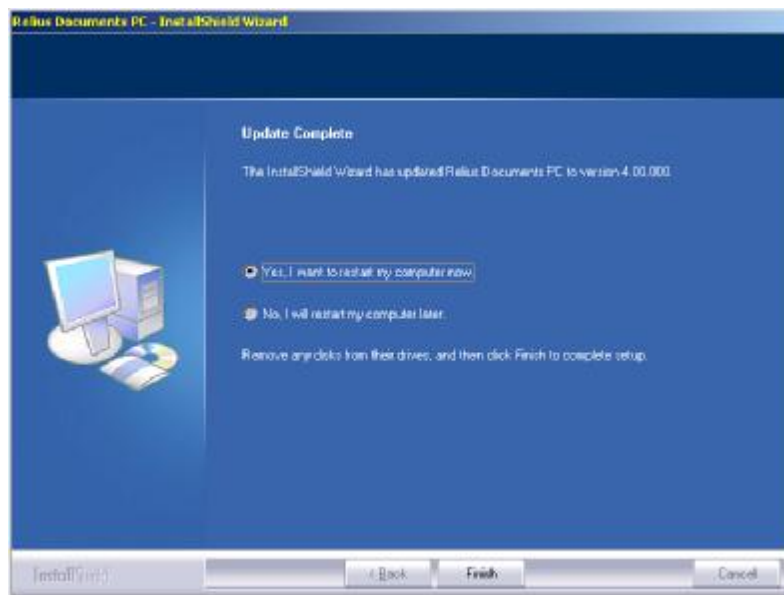
3.29   If action was taken in Step 3.1, restore the icons or shortcuts that were temporarily removed from the **StartUp** group or folder and remove the remark from the **RUN=** and **LOAD=** statements from WIN.INI. Restart any services that were temporarily set to "Manual" and – if necessary – place them back in "Automatic" mode.

3.30   Any shortcuts for RDPC 3.x that were manually created or edited, such as those placed on the users' desktop must be edited or removed, as program file names have been changed.

3.31   After finishing all configurations and system settings, users in networked environments need to proceed to Appendix A to set up additional workstations.

4	Connecting to Your Database

Once the installation is complete, there are several steps that need to be taken before you can access RDPC. This Section is intended for new installations to confirm successful connections to new databases. Upgraded systems do not need to follow the Steps in this Section.

4.1   Click *Start | Programs | Relius | Documents | RD Admin Utility*. This program allows you to change user information, verify licensing, and set program file and database locations.

4.2   Add, delete, or edit the appropriate users within your system. Exit the utility when finished.

4.3   Click *Start | Programs | Relius | Documents | RD System Update*. This program imports languages into your database. See Section 6 for more information.

5	Database Maintenance

The Steps in this Section are intended for use by Standalone clients only. SQL Express Server users should refer to the RDPC Database Server Instructions. Microsoft SQL Server users should consult the documentation that came with their software. SunGard Relius has provided a new utility that will enable full database exports for the purposes of backup and security.

5.1 Click *Start | Programs | Relius | Documents | RD Database Maintenance*.
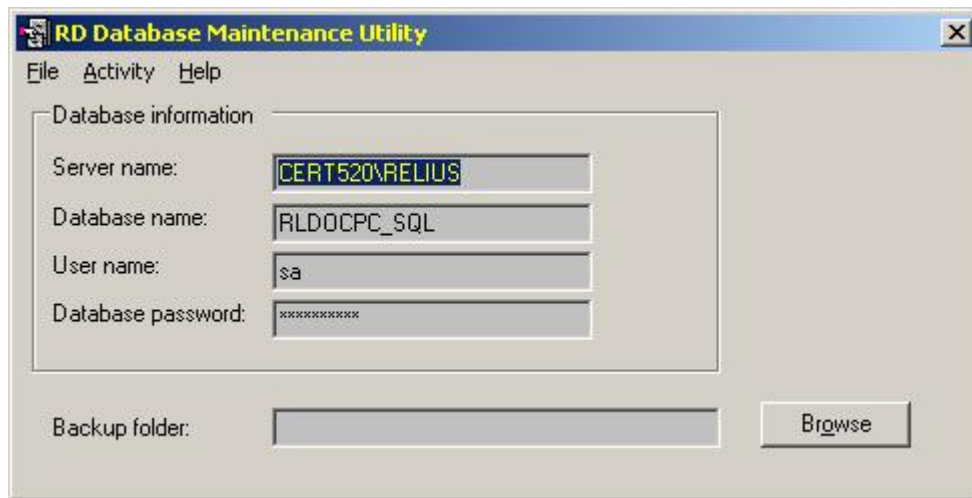
5.2 Verify your information, then enter or browse to your backup folder (e.g., D:\Backup). Click *File | Save Settings* to store any changes you have made.
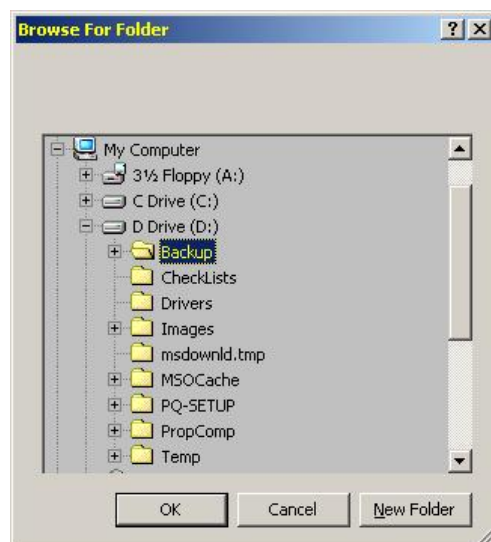
5.3   Click *Activity | Backup*. Wait for the message telling you of a successful backup. The file format is as follows: DatabaseName_Date_backup.bak. Therefore, if a database were backed up from an database named RLDOCPC_SQL on August 1, 2006, the backup file would be named RLDOCPC_SQL_080106_backup.bak. Use this information to locate and archive your data. When finished, make a backup copy of the \DP_Data directory where RDPC is installed to the workstation.
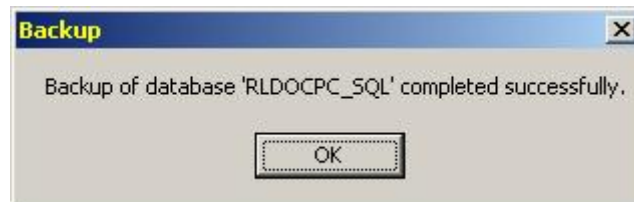
5.4   To restore a backed up database, click *Activity | Restore*.
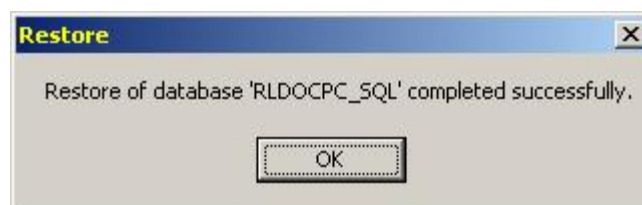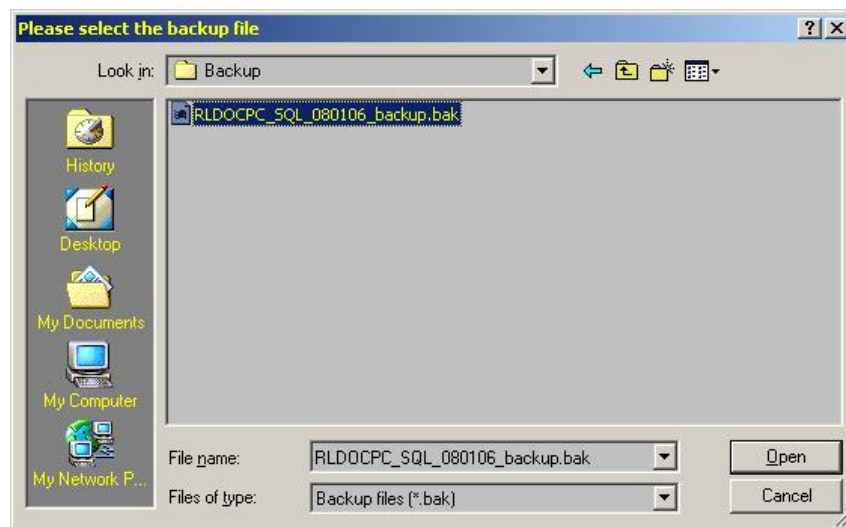
5.5   Click *Activity | Check Database* to verify your database is on-line and ready for use.
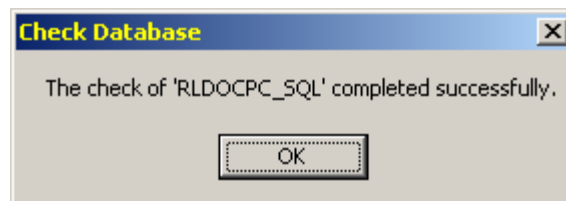
Please note: The following Steps can only be performed at a standalone workstation or the SQL Server Express database server (provided by SunGard Relius). SQL Server 2000 or SQL Server 2005 systems must use the backup procedures provided by Microsoft. Do not perform these tasks until you have completed the previous Steps in this Section.

5.6   The backup process can be automated by adding an automation "switch" to a command line placed in the Windows Scheduler. Open *Scheduled Tasks* within Control Panel and double-click *Add Scheduled Task*.
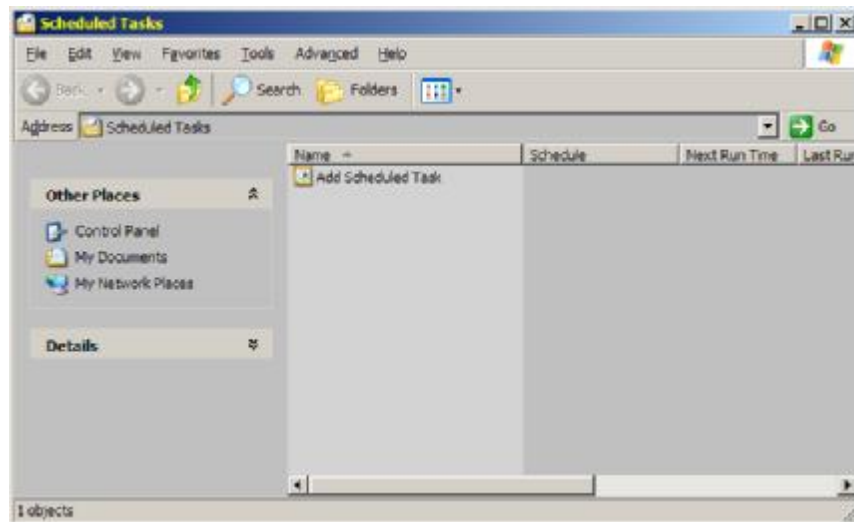
5.7   When prompted for the program file, scroll down the list and click "RD Database Maintenance." Then click *Next*.

5.8   Select the frequency of your automated process. When you are prompted for a username and password, you must enter a user that has local Administrator rights so the task can run properly. The password must match what that user must enter to log into the operating system.

5.9   At the final entry, be sure to check the "Advanced" feature. You must edit the advanced properties to make the program function automatically. See next step.

5.10   Edit the "Run" field by adding the switch "\backup" (include a space between the command and the switch). The "switch" must be a backslash. For example:

```
C:\Program Files\Relius\Docs\DBUtility.exe \backup
```


5.11   You may be prompted to re-enter the username and password. When finished, test the automated backup to verify proper function and location. If you do not receive a message stating the backup was successful, recheck your parameters and try again.
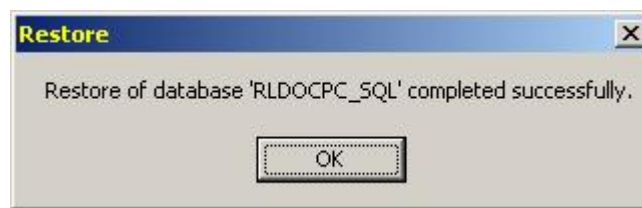
6	Adding Language Packs

This Section is usually for new clients. Language Packs are located on the SunGard Relius Web site. Your Welcome Letter should advise you on which language packs are licensed for your use. If you are using "custom language," please contact your Support Representative for information regarding language updates.

6.1   Go to http://www.relius.net/support/loginform.asp, enter your Customer ID and Password, and then click Login.

6.2   Under Relius Software, click **Documents PC**.

6.3   Locate the box entitled "Language Packs." You may have to scroll down to find it.
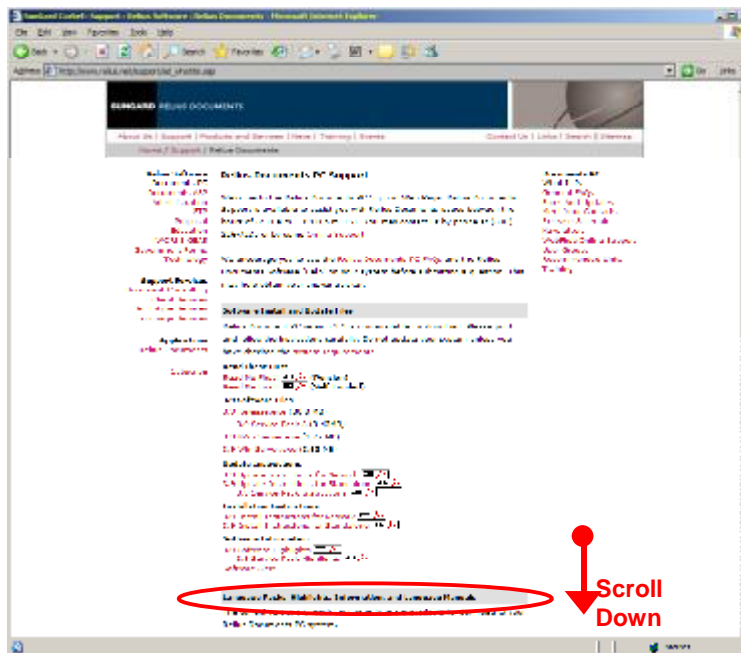
6.4   To begin the download, click on the language pack that corresponds to a licensed language pack outlined in your Welcome Letter (e.g., Individually Designed/Volume Submitter).

6.5   When prompted to Run/Open or Save/Download, choose Save/Download. Do not run or open the application across the Internet. The installation may fail if your connection is interrupted.

6.6   If prompted for a location, choose a location where your download can be easily accessed.
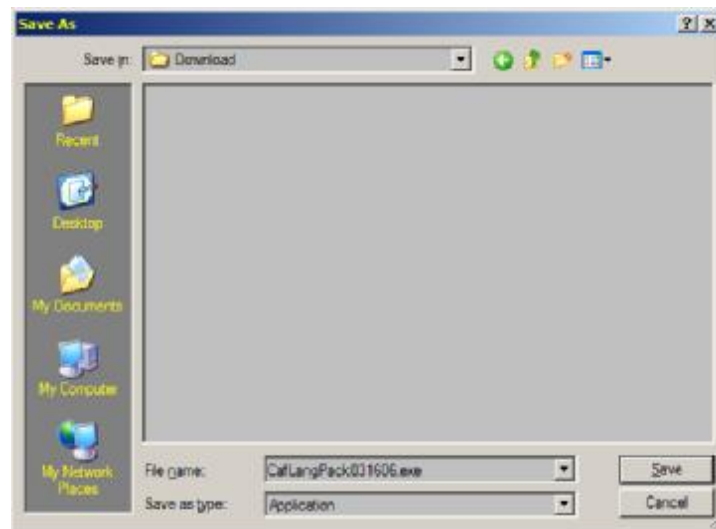
6.7   When the download has completed, double-click the Language Pack file to start the copy and import process. The Welcome Screen will appear. Click *Next*.

6.8   The installation will evaluate your system to confirm that the language pack can be
        installed and imported. Click *Next* to continue.
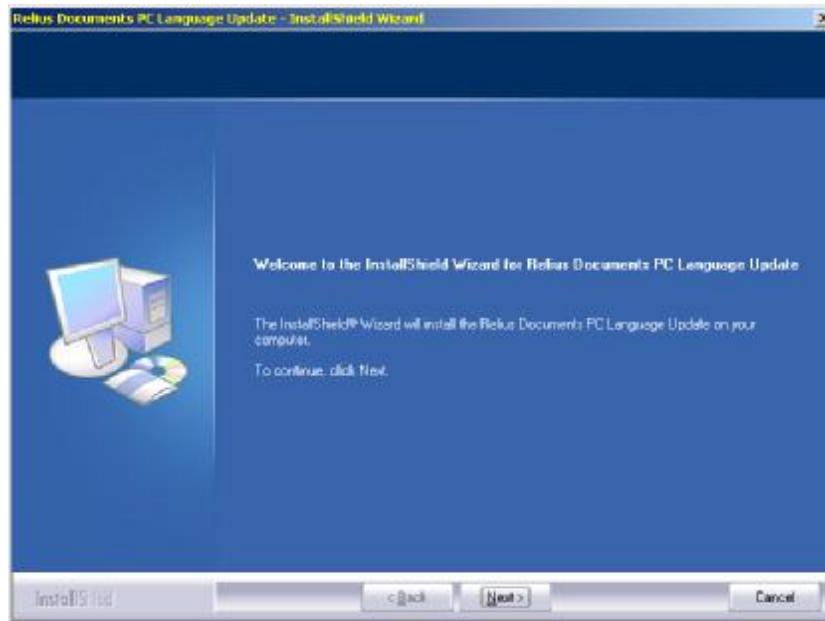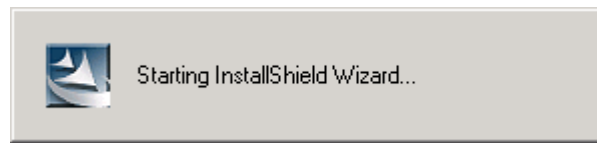
6.9   When the evaluation is complete, the installation will display your environment variables
        necessary for importing your language pack. Click *Next* to continue.
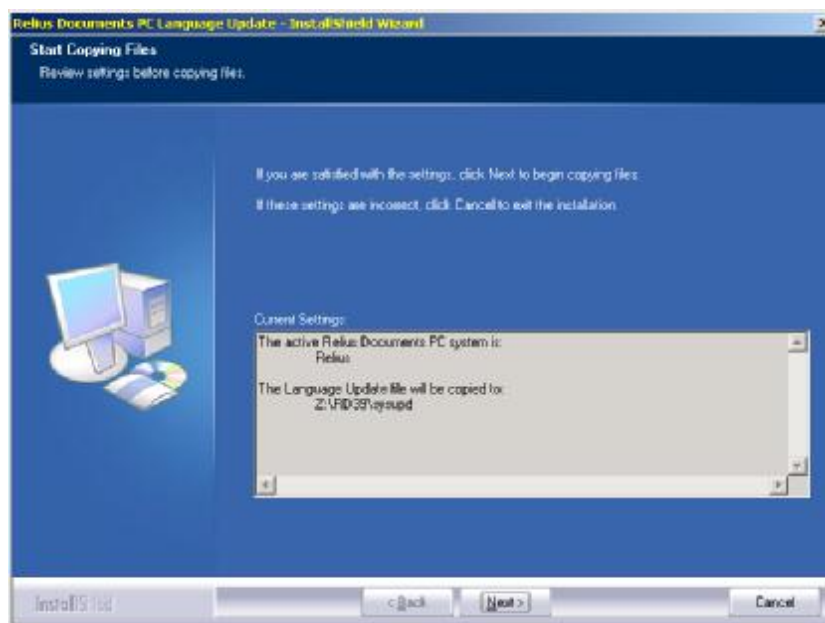
6.10 When the files have copied, you will see a "*Finish*" screen. Be certain that the option to update with the new language is checked. Then click *Finish*.
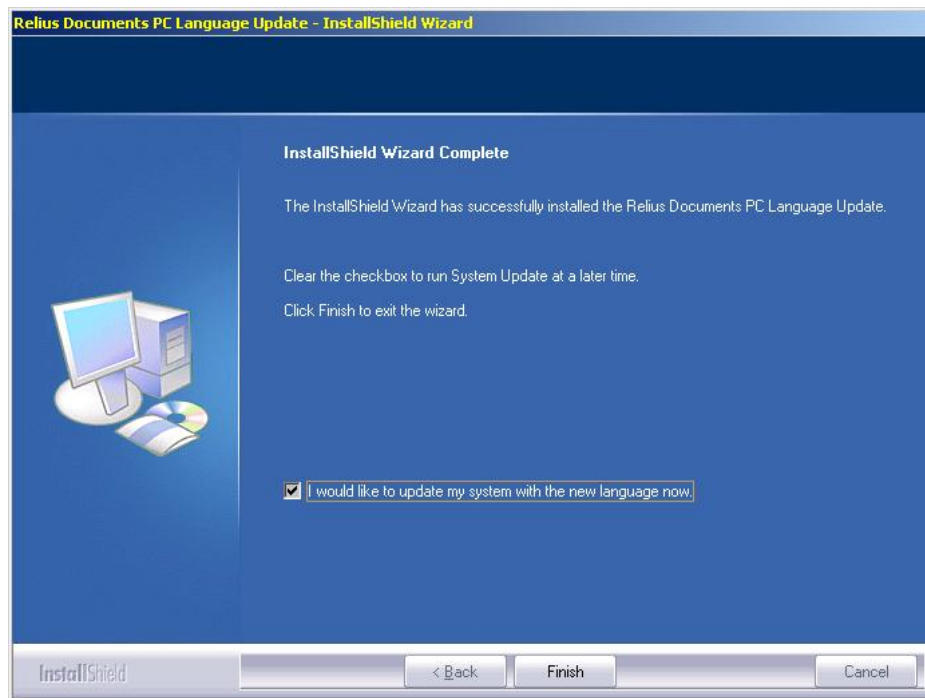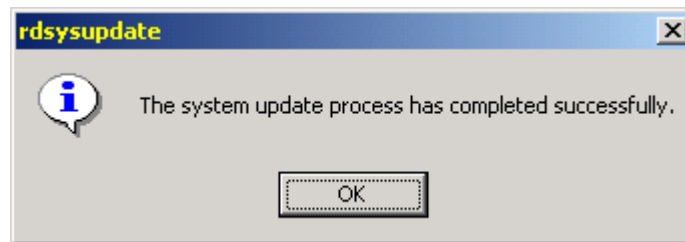

6.11 The System Update screen will appear. Expand the language pack to be updated and select each type and product to be updated. You can select all by clicking the top item, holding the <Shift> key, and then clicking the last item. When ready, click *OK*.
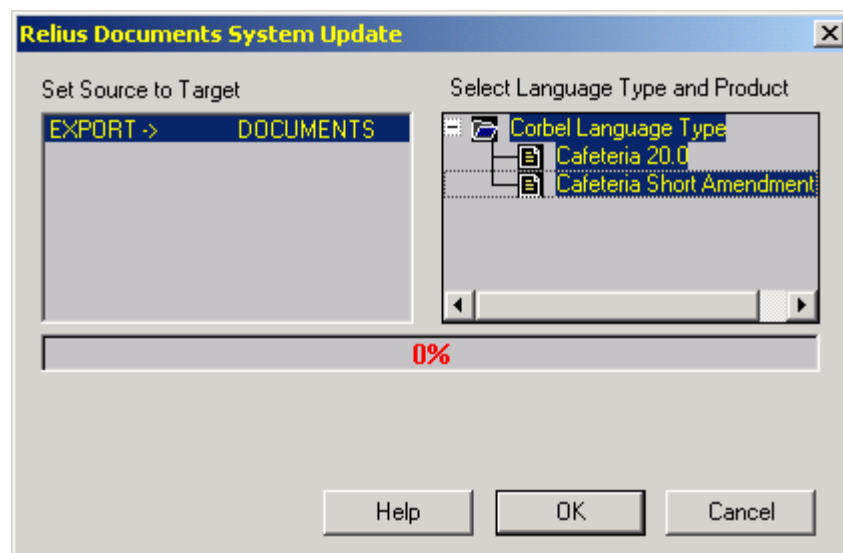
6.12   Wait while the languages are updated. Do not interrupt the process.

Relius Documents System Update

Set Source to Target

EXPORT ->   DOCUMENTS

Select Language Type and Product

Corbel Language Type
Cafeteria 20.0
Cafeteria Short Amendment

8%

Copying Codes

Help   OK   Cancel
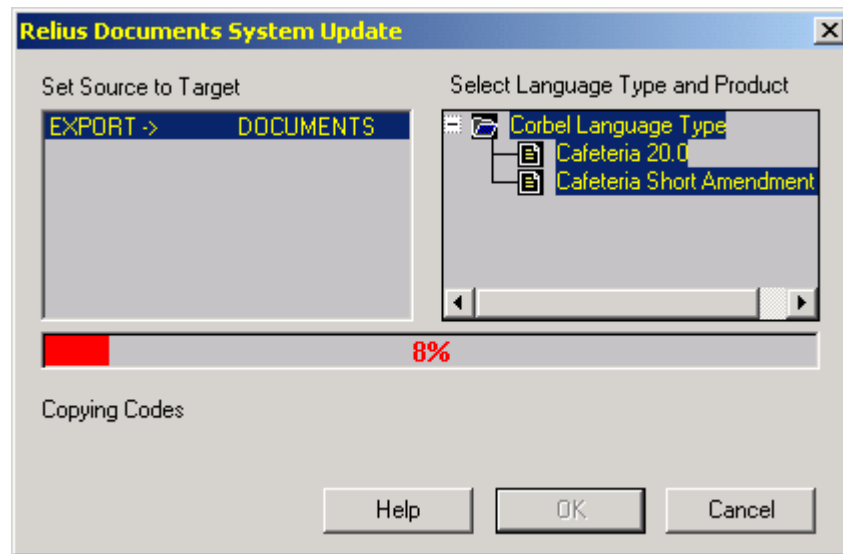
6.13   You will be informed when the update is complete. Click *OK*.

rdsysupdate

The system update process has completed successfully.

OK

Appendix A   Setting Up Additional Networked Workstations

In a networked environment, once the "Admin" PC has been successfully set up, you will need to run the installation for each workstation that will access RDPC. Ensure all workstations are consistently mapped across the enterprise. Failure to do so may result in licensing errors.

A.1   From another workstation, run Setup.exe from the **\Setup** directory where RDPC was installed on your network. In this case, it would be **Z:\Rdocs\Setup\Setup.exe**.
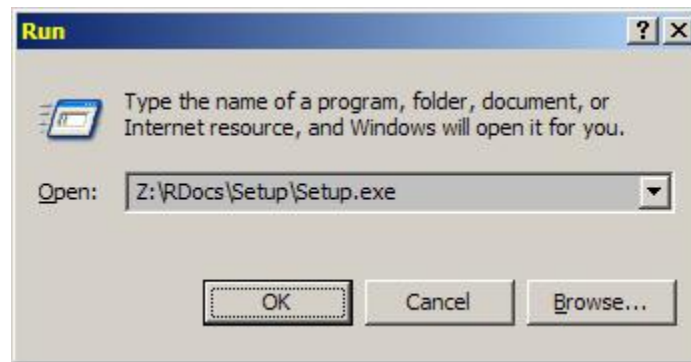
A.2   The setup program will extract the necessary files to begin the installation.
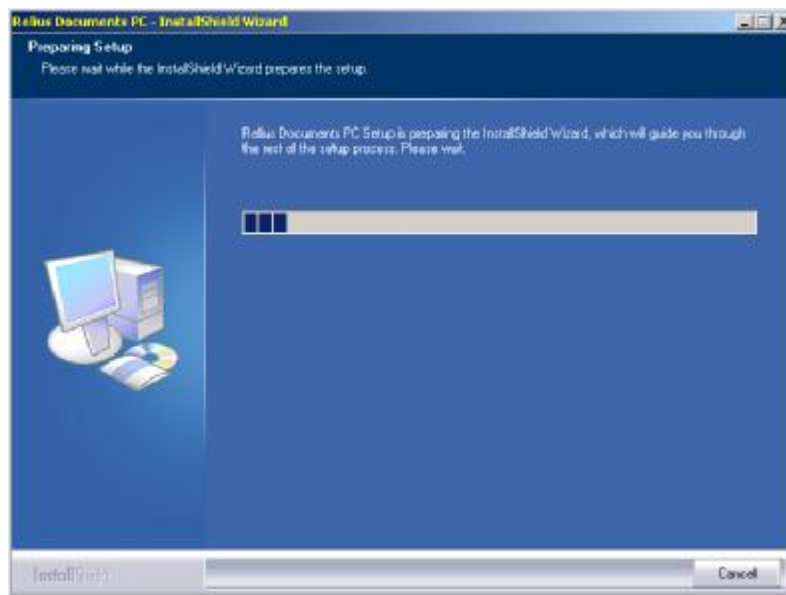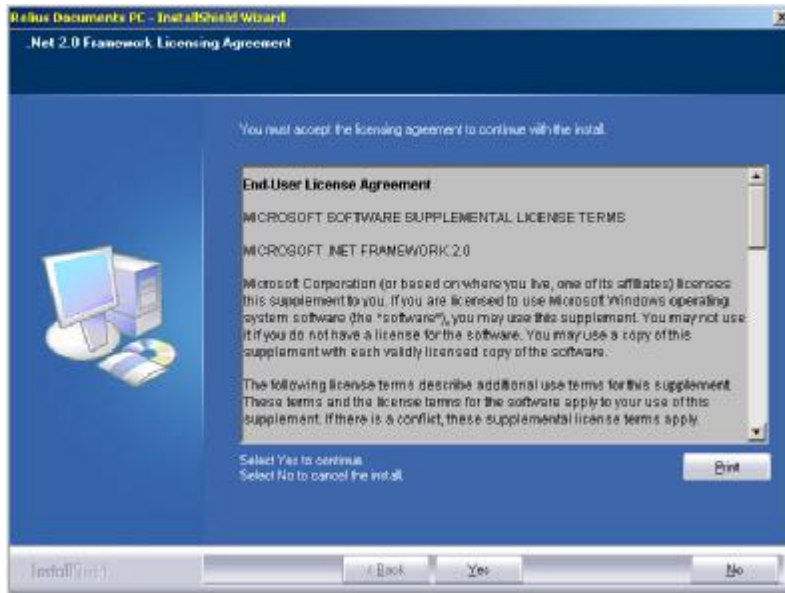
A.3   Click *Next* at the "Welcome" screen.
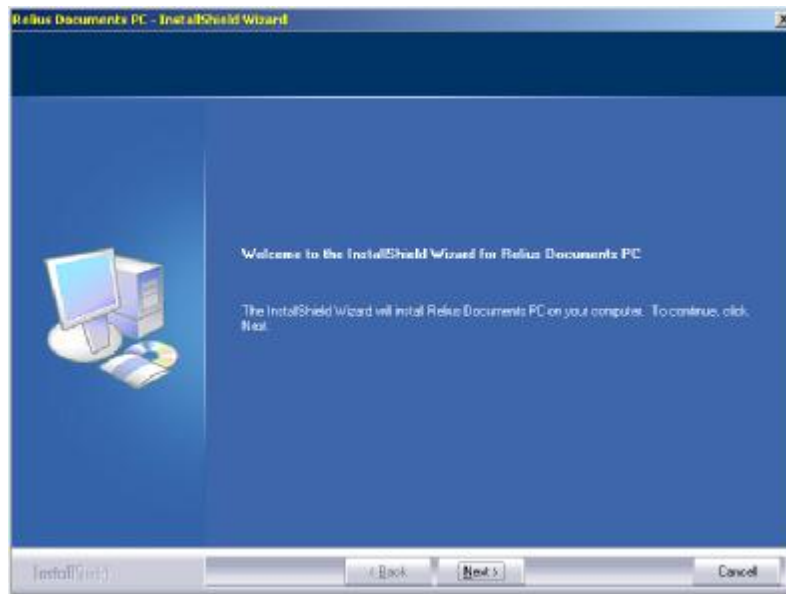
A.4   Enter the User and Company names for this workstation and click *Next*.
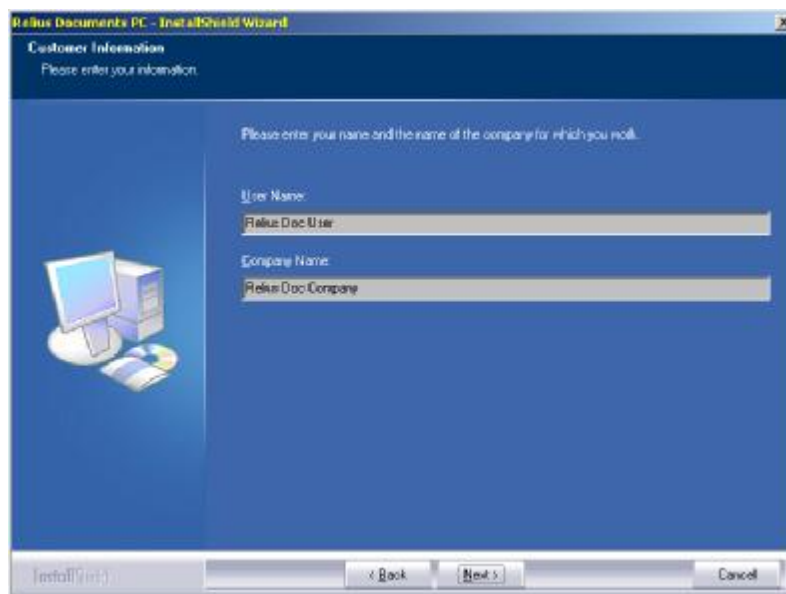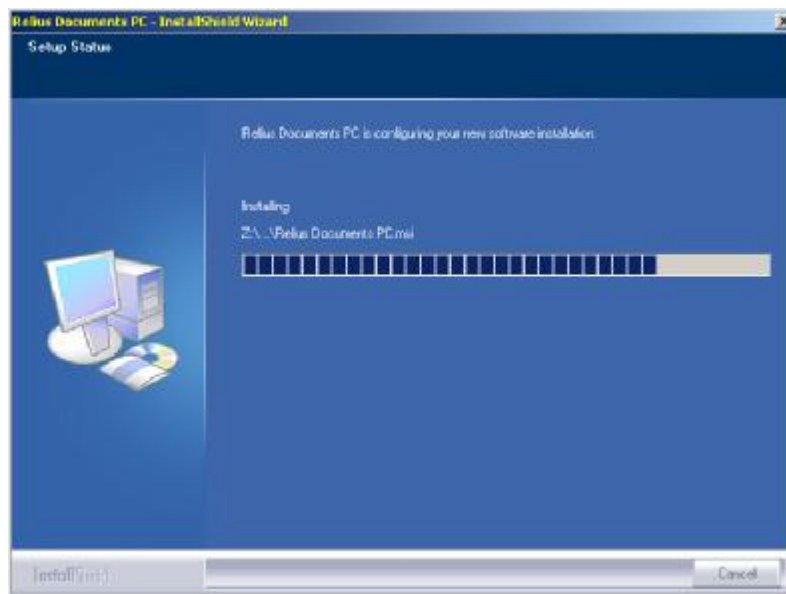
A.5   If Microsoft .NET or other component is not yet installed to the workstation, you will be
   asked to read the EULA and click *Next or Yes* to continue.
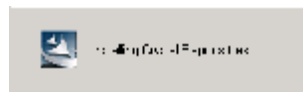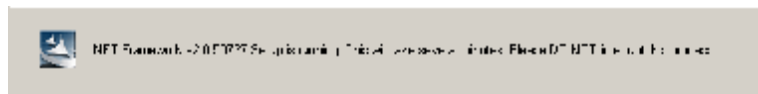
A.6   When all auxiliary components have completed their installation, you will be prompted to confirm your installation settings. Click *Next* to continue.
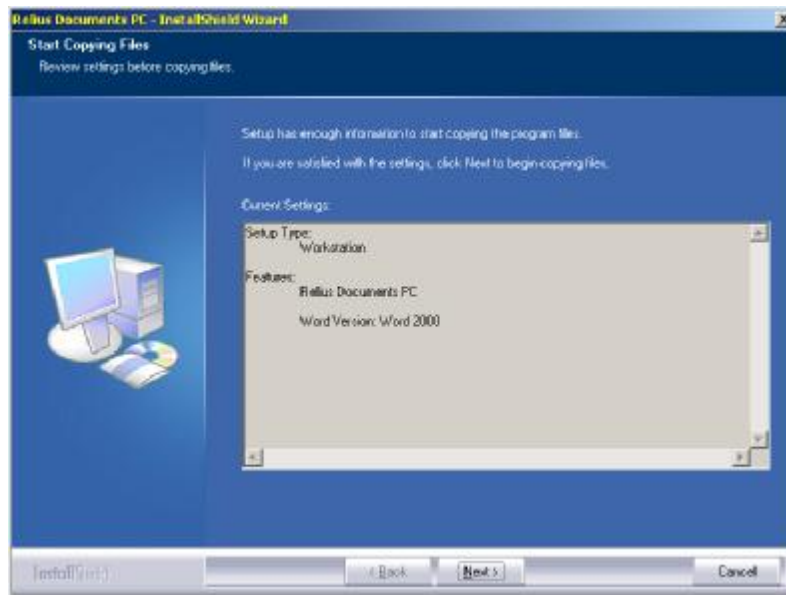
A.7   RDPC will install the necessary files to your workstation.

A.8   When the installation is finished, you will be prompted to restart your workstation. **Be sure** *"Yes, I want to restart my computer now"* **is chosen and click** *Finish*. Your workstation will shut down all applications and restart. **Do not** interrupt.
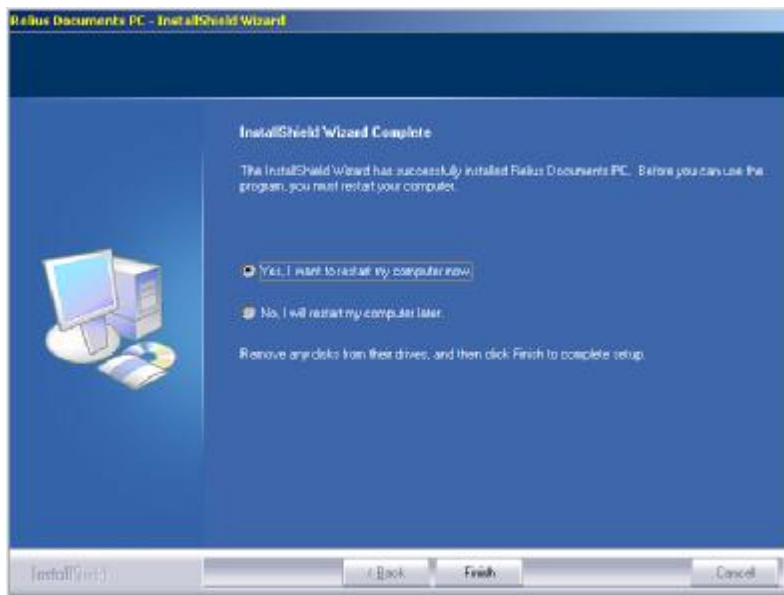
Appendix B   Migrating RDPC to a New PC

Clients who wish to migrate RDPC from an older system to a new one will have to follow additional steps within the normal scope of updating RDPC. SunGard Relius has reviewed the various migration possibilities and derived the following additional installation instructions. Clients are reminded that these instructions are provided as generic as possible and may need to be adapted for different scenarios. For further instructions, contact Relius Technology Support.

B.1   If your existing networked RDPC 3.9 workstations are unavailable or will not meet system requirements for migration:

- Install 3.9 to one new PC.
- Connect to the RDPC 3.9 database and verify operability.
- Upgrade to RDPC 4.0.
- Install RDPC 4.0 to all other new PCs (see Appendix A).

B.2   If your existing networked RDPC 3.9 "admin" workstation is available for migration:

- Connect to RDPC 3.9 database and verify operability.
- Upgrade to RDPC 4.0.
- Install RDPC 4.0 to all other new PCs (see Appendix A).

B.3   To migrate your existing Standalone RDPC system:

- Install RDPC 3.9 to new PC.
- Unload (through SQL Talk) the database from old PC.
- Copy the "unload" file from old PC to new PC.
- Copy "DP_Data" directory from old PC to new PC.
- Load database (through SQL Talk), launch RDPC 3.9, and verify operability on new PC.
- Upgrade to RDPC 4.0.

Disclaimers and Copyright Notices