

The logo for SUNGARD, featuring the word "SUNGARD" in a bold, white, sans-serif font on a black rectangular background.

RELIUS PROPOSAL
Solutions for retirement services

Version 10.0 ***Installation and Configuration***

April 30, 2013

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1 Overview

Please read the entire document before beginning. **This document covers the installation of Relius Proposal 10.0.** If you are unclear about this installation, please contact Support at 1-800-326-7235, option 3.

Release Updates will be installed via self-extracting installation program. Simply double-click the downloaded file and follow the on-screen prompts, detailed herein. If necessary, the database will be updated automatically. Files will be copied to their appropriate location, and then the system will finalize the settings necessary to run the updated release.

The installation of Relius Proposal 10.0 involves the following basic procedures:

- 1) **Read and understand this document.**
- 2) Ensure all workstations to be upgraded have Relius Proposal 9.0 or later properly installed and configured. Otherwise, install the Relius Proposal Component DVD to new workstations. (Information on installing the Component DVD can be found in Section 3.)
- 3) **Note:** Installing to a Windows 7 machine does not require Relius Proposal 9.0 to be installed first as Relius Proposal 9.0 is not supported on Windows 7. However, you will be required to first install the Relius Proposal Component DVD.
- 4) Ensure your database has been properly exported and backed up.
- 5) Install Relius Proposal 10.0.
- 6) Set up additional workstations (if necessary).

2 Installation and Environment Considerations

2.1 Installation Methods

Relius Proposal 10.0 is available via download from the SunGard FTP Site (<https://www.relius.net/support/Login.aspx>). Each workstation will require access to the downloaded file. If a network drive is used to share the database, it must be mapped with a drive letter assigned. Running the Relius Proposal 10.0 SETUP from a network drive accessed by browsing with Network Neighborhood will **fail**. Other methods of installing (“push” or “ghost” technology, Z.E.N. Works, Zip Drives, etc.) are neither supported nor recommended.

2.2 Software fixes via Internet

Fixes, support files, and updated documentation are distributed via the web at <https://www.relius.net/support/Login.aspx>. Users must have Internet capability to receive these fixes. Once you have logged on, click the “Proposal” link to browse the list of available material. You can click “*Subscribe*” to receive notification of new fixes by e-mail. SunGard no longer sends patches, updates, and update documentation through the mail, and we strongly urge all users to subscribe to this service.

2.3 Virus Scanners

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

2.4 Security Considerations

Responsibility for support of problems and issues related to Relius Proposal 10.0 running in a user-restricted security configuration is that of the end user. Certain circumstances may require billing on a time and material basis. SunGard cannot guarantee that Relius Proposal 10.0 will install or operate properly on any given locked-down security configuration. Relius Proposal 10.0 is certified and supported only when run on the default Windows user security settings.

The Windows Administrator (or a user with equivalent local Administrator rights) **must** run the installation.

2.5 Network Installations

The best practice for upgrading a network environment is to run the upgrade from an existing system. If an existing workstation is upgraded and the database is on the network, the program files will be installed locally and the database will remain on the network. The “Workstation” option is no longer available. Once the database has been updated by the first workstation, the upgrade process will skip over the database-upgrade process.

2.6 Supported Operating Systems

The following operating systems are supported:

- Windows XP, Service Pack 3
- Windows Vista, Service Pack 2
- Windows 7

Operating systems must be installed to the local hard drive of each workstation. Diskless workstations and operating systems that run from the network are **not** supported. For more information, see our web site (<https://www.relius.net/support/Login.aspx>).

The following server operating systems are supported (but can only be run if your Relius Proposal license allows for Terminal Services):

- Windows Server 2003, Service Pack 2
- Windows Server 2008, Service Pack 2
- Windows Server 2008 R2

2.7 Hardware and Software Requirements

All hardware requirements are specified on our web site (<https://www.relius.net/support/Login.aspx>).

- Appropriate printer driver (HP LaserJet III or greater).
- TCP/IP Network Protocol for multi-user systems.
- Minimum video resolution of 1024 x 768 with 256 colors.

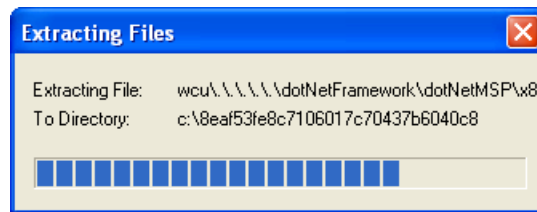
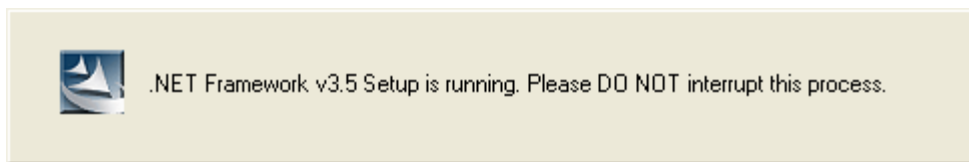
2.8 Update Order of Installation

Your workstations and database must be running Relius Proposal 9.0 (or greater) before installing this release to an existing system. Running the installation against a lower version of Proposal will cause the installation to fail.

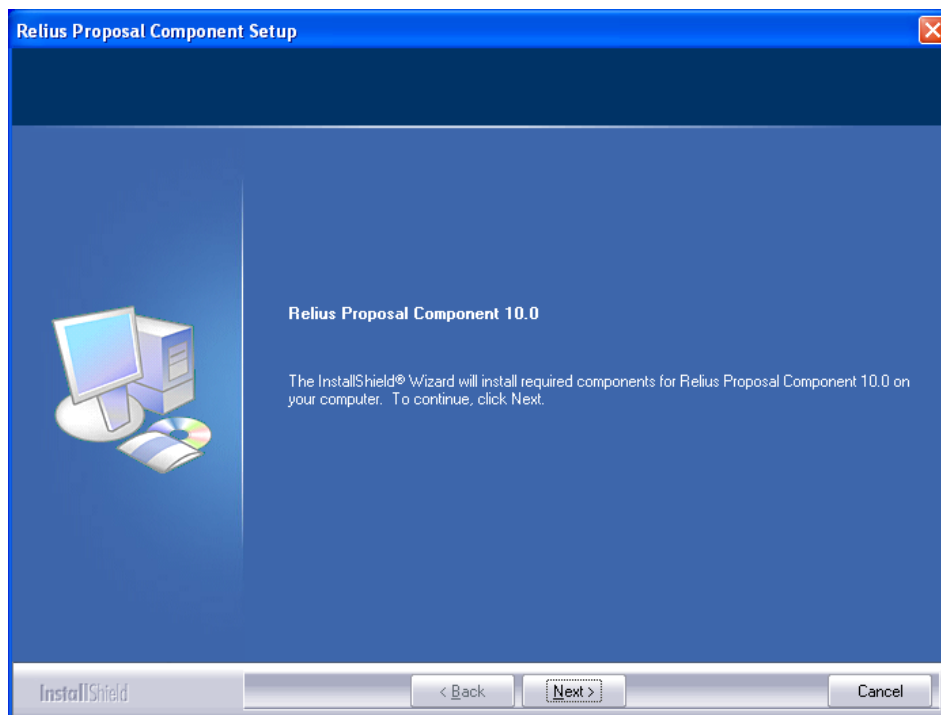
3 Performing the Component Installation

New installations of Relius Proposal 10.0 may require the Relius Proposal Component DVD to be run if Crystal Reports 2008 SP3 is not previously installed.

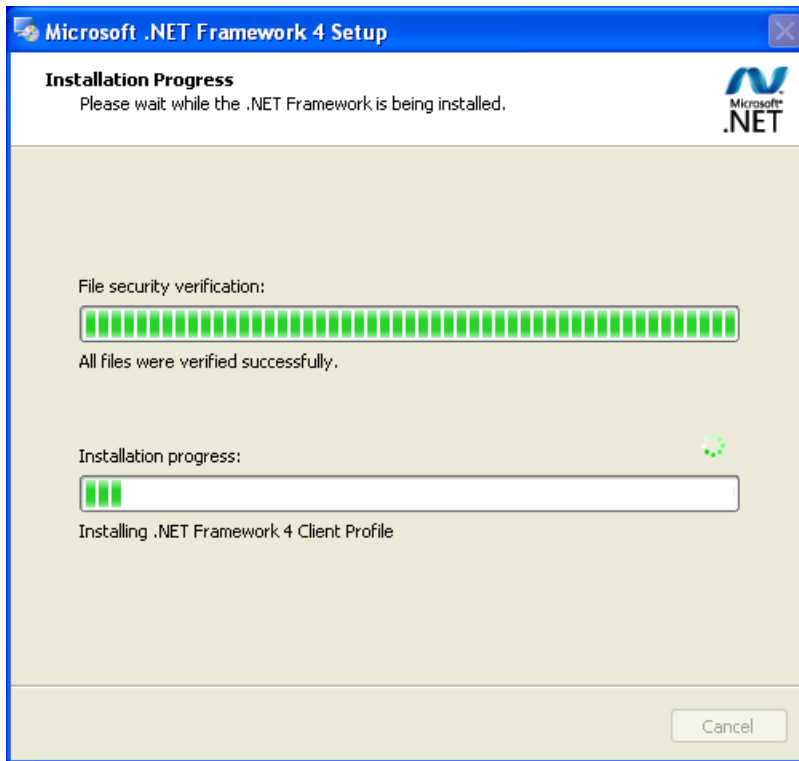
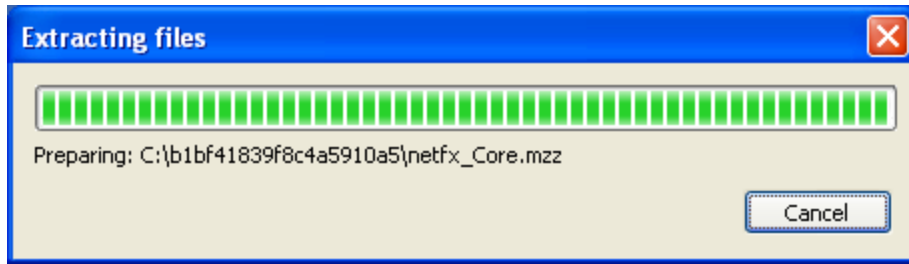
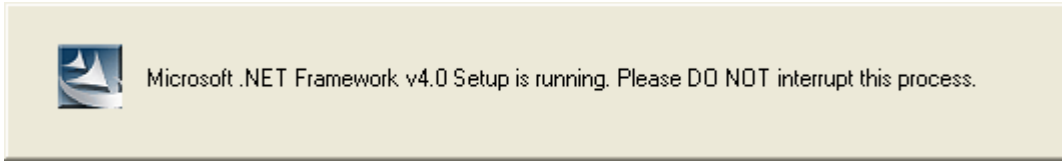
- 3.1 If this is a new installation, insert the Component DVD into your DVD-Rom drive. The installation may start automatically. If it does not, click *Start*, then *Run* and type **<DVD Drive>:\Setup.exe** in the command box, then click *OK*.
- 3.2 If Microsoft.Net 3.5 SP1 is not yet installed on your system, it will install first. This is required so that preliminary system checks can be made.



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



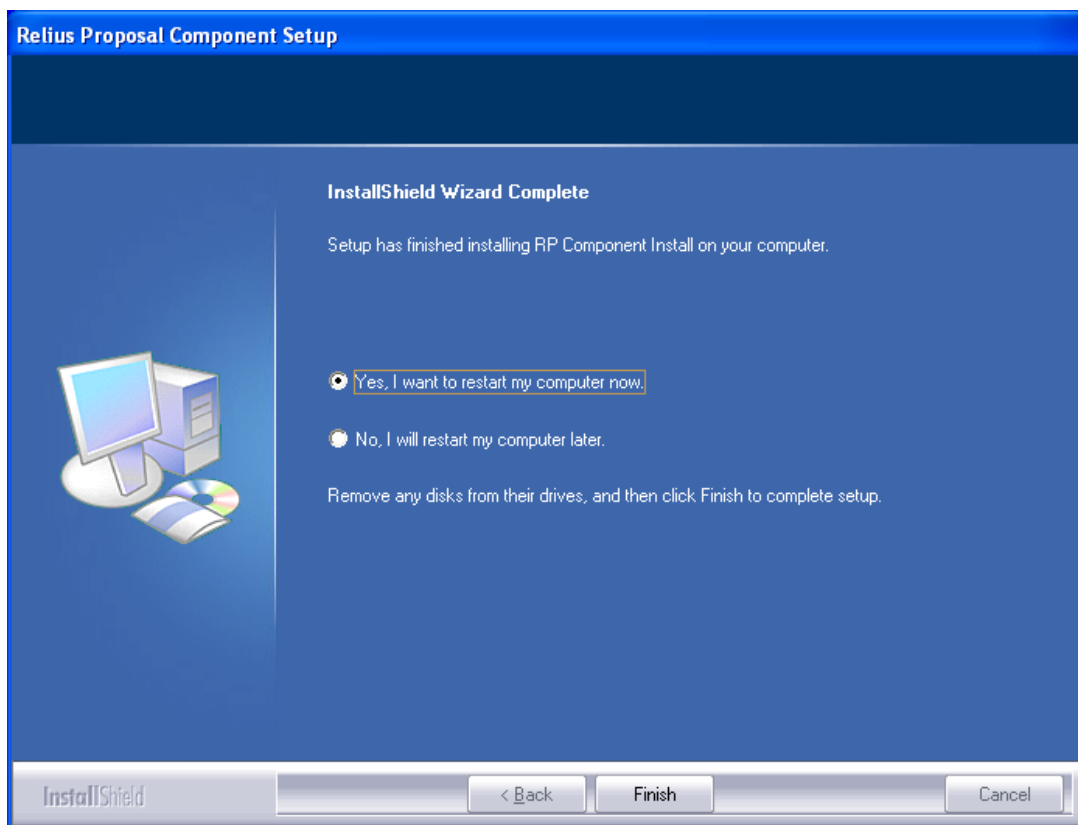
- 3.4 Prior to Crystal 2008 being installed, Microsoft.Net 4 will be installed and configured. If your system already has .Net 4, this step will be skipped.



- 3.5 The Crystal 2008 Installation will launch automatically. The time displayed can be misleading. Do not interrupt the process, as it may take longer than presented.



- 3.6 When the Component installation has finished, you may be prompted to restart your computer. If so, **be sure “Yes, I want to restart my computer now” is chosen and click *Finish***. Your workstation will shut down all applications and restart (if necessary). **Do not** interrupt the process.

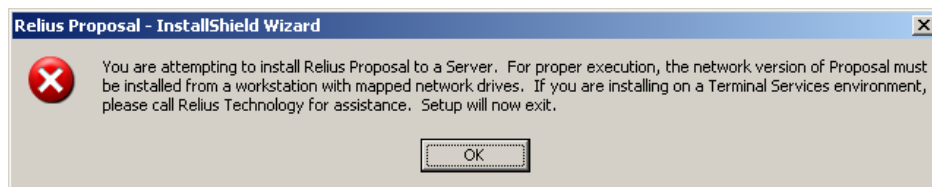


4 Performing the Relius Proposal 10.0 Installation

Pre-installation Notes:

- a) This installation is valid for Windows XP, Windows Vista, and Windows 7. All references to “Windows,” unless otherwise noted, are also valid for the above named operating systems.

Network installations to a Windows Server operating system must be performed from a workstation via mapped drives. Attempts to install Relius Proposal 10.0 at a server console will fail and result in the following message:



Installing Relius Proposal to a Windows Server operating system for purposes of Terminal Server hosting requires separate and additional licensing. Please call Relius Technology Support for guidance.

- b) Run Scandisk (also known as “Analyze”) to check the integrity of your hard drive and have any problems resolved before installing this release.
- c) Be sure no screen saver will become active during the installation. SunGard discourages the use of screen savers whenever running Relius Proposal or its Installer.
- d) Relius Proposal 10.0 installs many of its support files in the “System” directory, normally C:\Windows\System32 (32-bit) or C:\Windows\SysWOW64 (64-bit).
- e) The installation process takes approximately 1/2 hour to complete.
- f) Review the Relius Proposal 10.0 system requirements located on our web site (<https://www.relius.net/support/Login.aspx>). **Do not** proceed with the update if your environment does not meet the minimum system requirements.
- g) **Ensure you have a valid backup and database export of your system before beginning the update. Before beginning, you must READ and AGREE TO the following:**

In performing this update procedure, I – the software end user or individual intending to perform the software update – understand, acknowledge, and agree that this update program will make substantial necessary changes to my database to make it compatible with version 10.0. There is a potential for the

changes not to occur correctly, due to a variety of factors, many of which are out of the control of SunGard.

I understand that valid, restorable database backups are vital in order to recover from a situation where, for whatever reason, the database modification fails to occur successfully. Restorable backups are necessary to ensure that I can restore my system to its present state. I agree that SunGard is not responsible for performing my data backup, nor is SunGard responsible for setting up, monitoring, or warranting proper operation, backup, or restorability of data from said backup system. I agree that I – the end user, not SunGard – am fully responsible for the backup of data, for the integrity of backed-up data, and the restorability of backed-up data. I also agree that I am fully responsible for any consequences stemming from an inability to properly restore data, regardless of the reason or circumstance the restoration was made necessary originally, including software error or software fault attributable to the SunGard -provided software product or service.

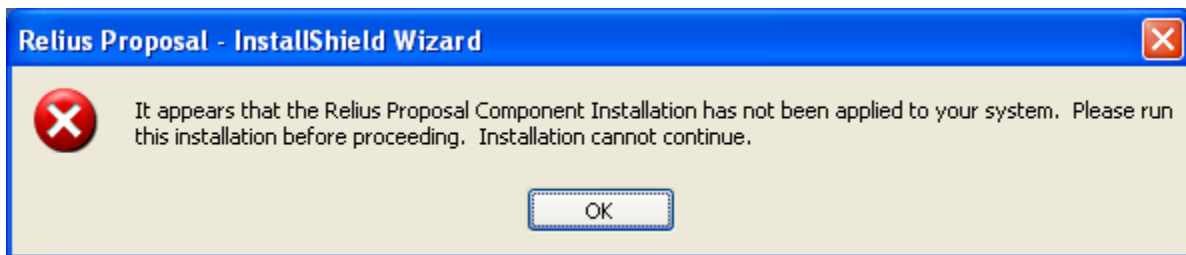
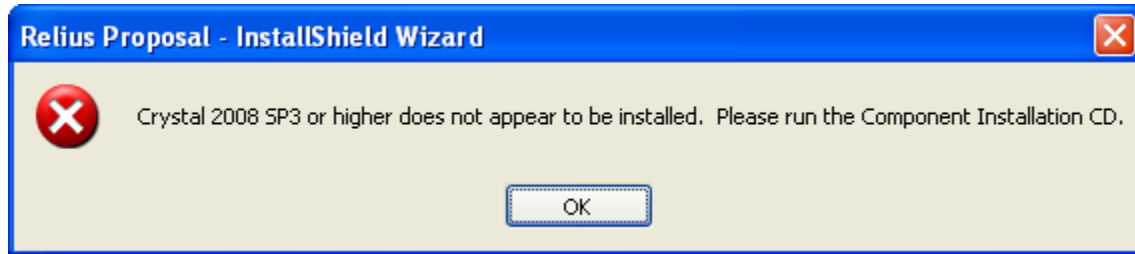
I understand and agree to the above. Use of this release indicates my acceptance of the terms above. If I do not agree with the terms above, I will not perform this update and will contact SunGard for assistance.

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

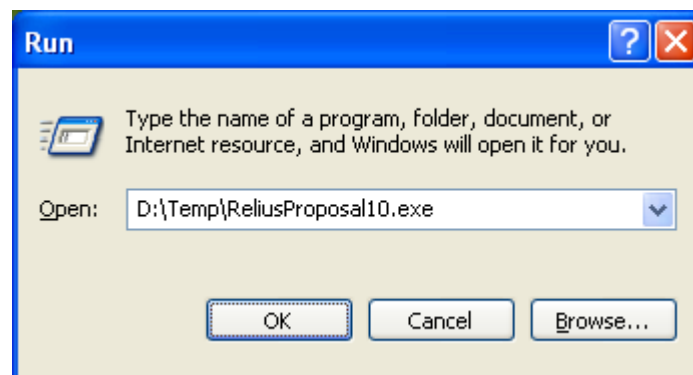
Unless otherwise noted, all activities contained herein must be directly conducted at a Relius Proposal workstation.

- 4.1 Download the self-extracting installation program (ReliusProposal10.exe) from the SunGard Relius FTP Site (<https://www.relius.net/support/Login.aspx>) and copy it to an easily accessed location. *In these instructions, D:\Temp will be used.*
- 4.2 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.

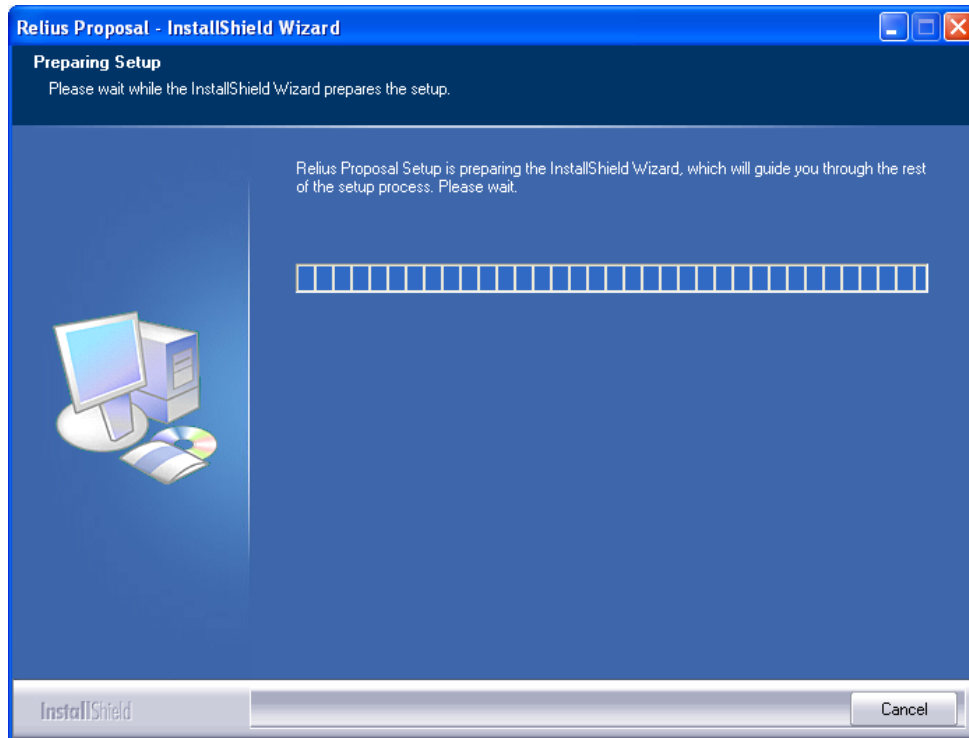
- 4.3 New installations of Relius Proposal 10.0 will require the Relius Proposal Component DVD to be run if Crystal Reports 2008 (or other required component) is not previously installed. If you receive either of the messages shown below, revert to Section 3 before continuing.



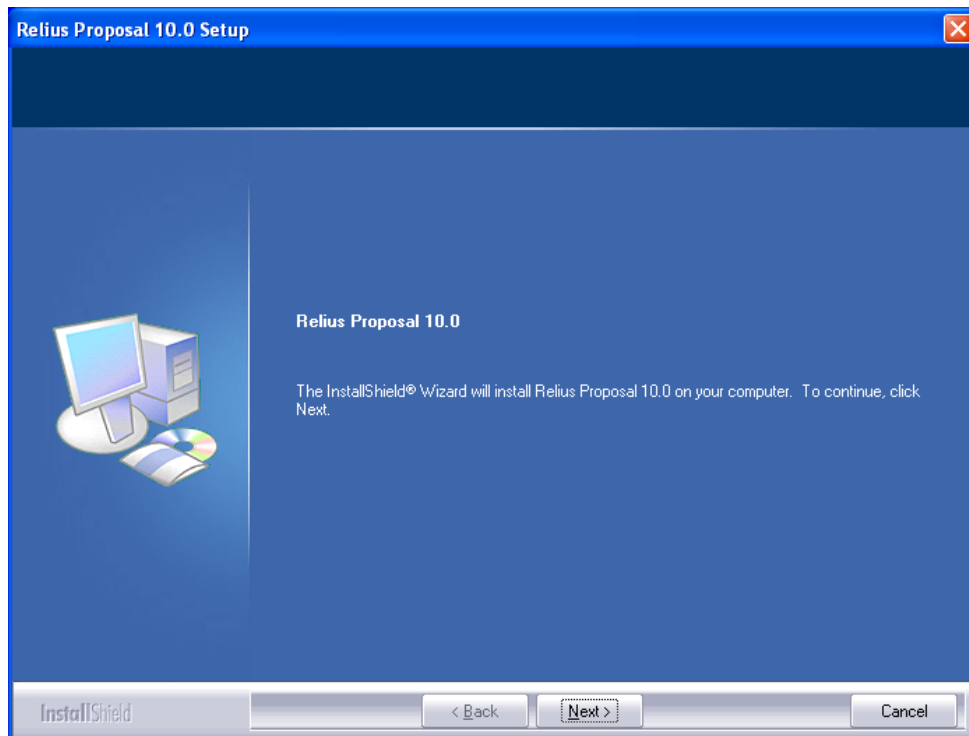
- 4.4 Re-start the computer. Windows or other programs may have locked some files that need to be overwritten during the update process.
- 4.5 Temporarily disable all virus protection.
- 4.6 Click *Start*, then *Run* and type **D:\Temp\ReliusProposal10.exe** in the command box, then click *OK*.



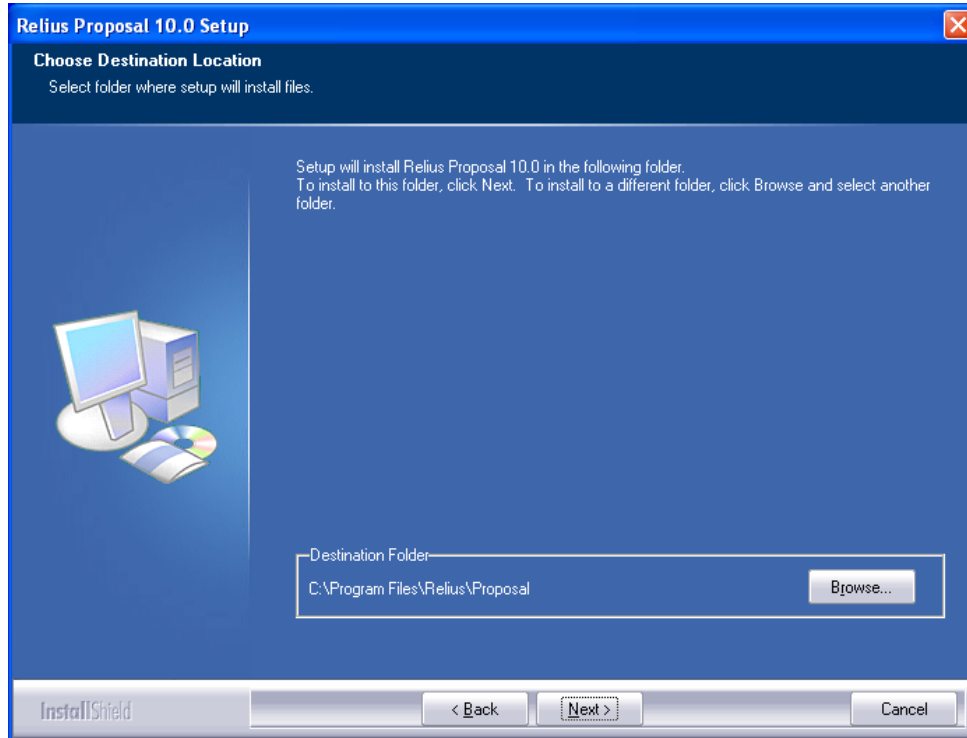
- 4.7 Because this installation is a self-extracting executable, several files will extract and copy to temporary locations for the installation process.



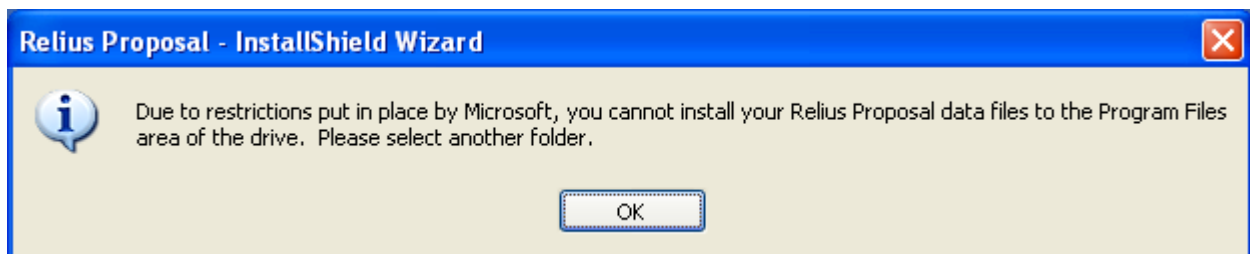
- 4.8 The Relius Proposal 10.0 Setup “Welcome” screen appears. Please note that all open programs need to be closed at this time. Click *Next* to continue.



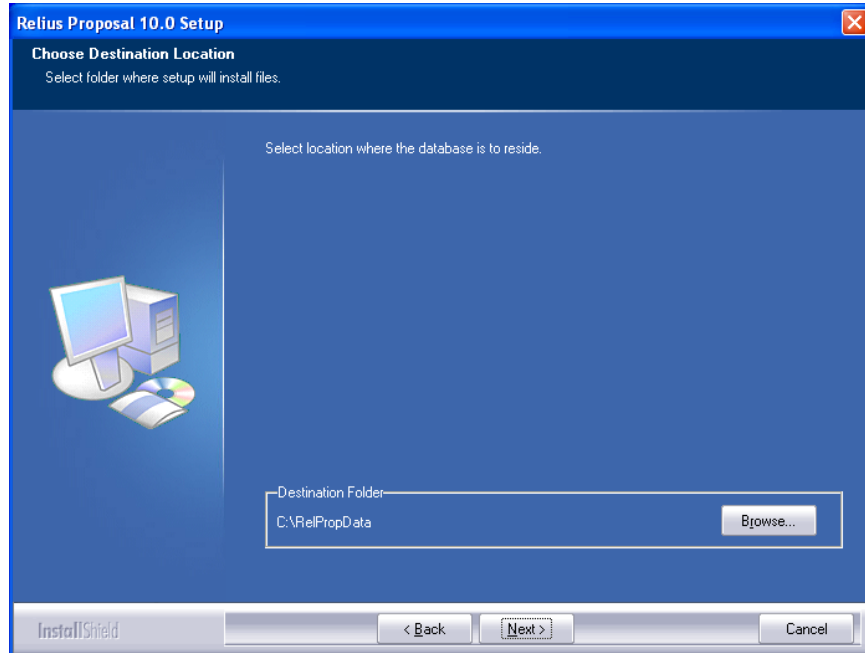
- 4.9 Choose the location of your program files. The default (recommended) location is C:\Program Files\Relius\Proposal (or C:\Program Files (x86)\Relius\Proposal for x64 systems). Do not install to a network drive, even if your database resides on the network. You will be prompted for the location of your database in the next step. Click *Next* to continue.



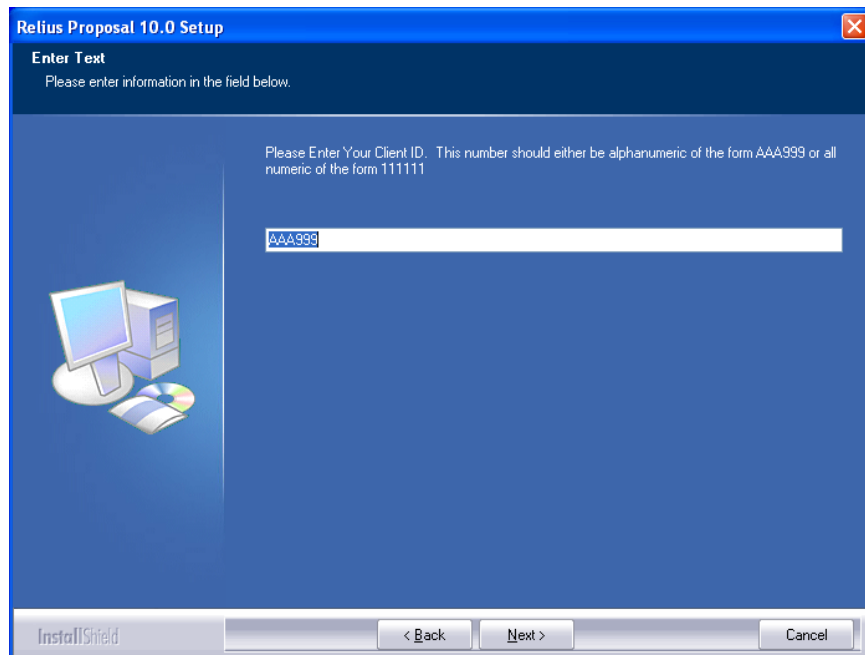
- 4.10 You must then select the location of your database. Please note that the previous default program file location (C:\Program Files\Relius\Proposal) is no longer valid. Due to restrictions in place by Microsoft, you must install the database to a separate location.



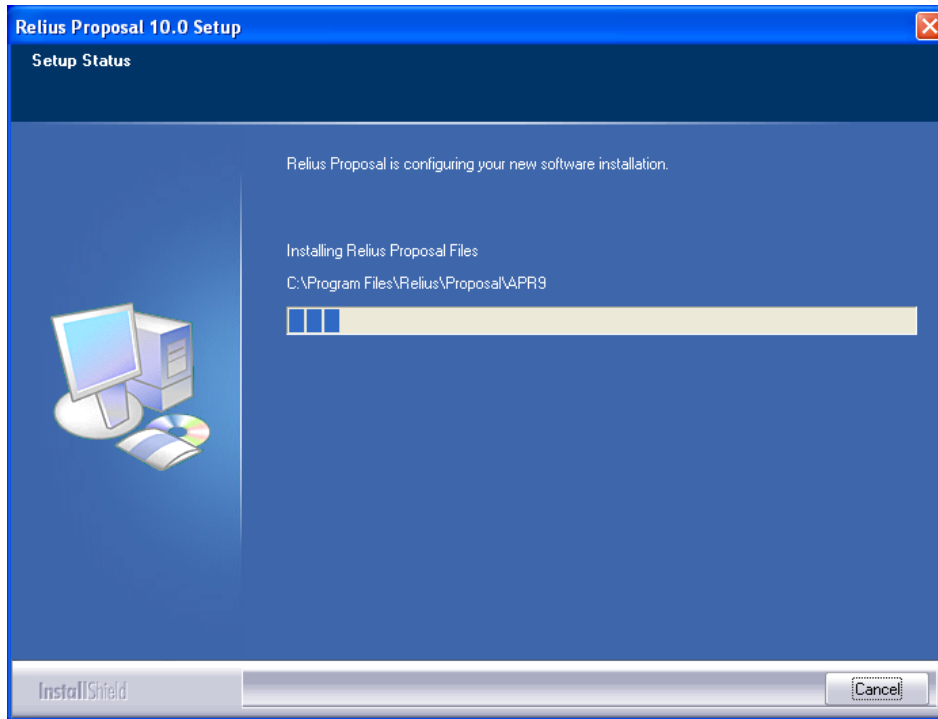
- 4.11 If you are installing a network database, ensure that the location is accessible by all Proposal users and the assigned drive letter is mapped to each workstation identically. **If you are upgrading your database, make certain that you are pointing the installation to the precise location. Otherwise, your data may appear to be “lost.”** The default is C:\RelPropData.



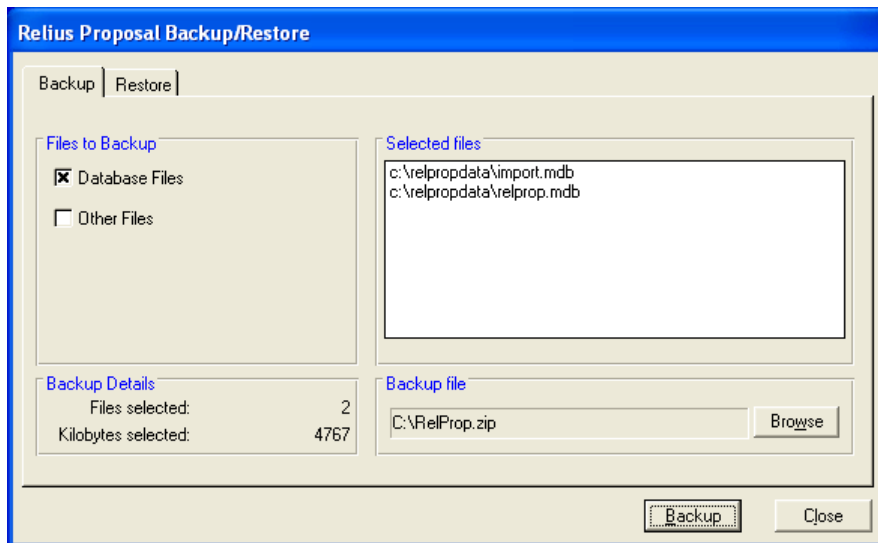
- 4.12 You must enter your alphanumeric ClientID. This unique identifier will allow you to use Proposal with all features for which you are licensed. Systems where Relius Proposal 9.0 or greater is already installed (or any recent version of Relius Administration), will not see this screen.



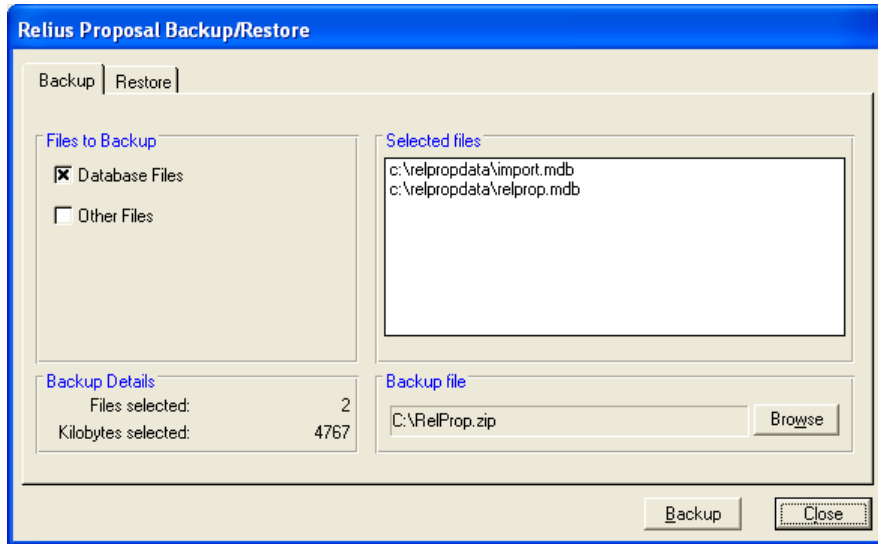
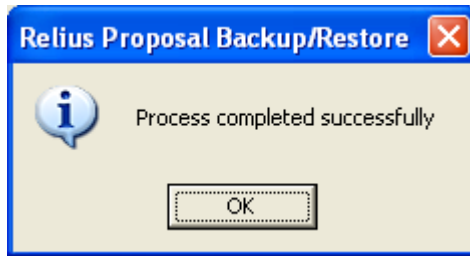
4.13 Program files will then copy to the locations you have set.



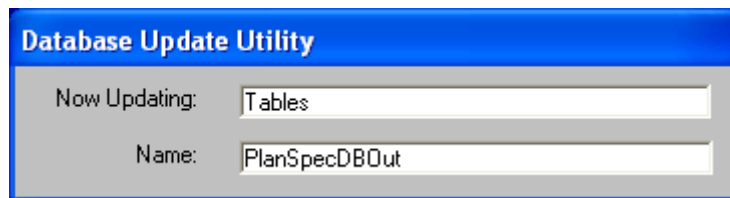
4.14 If you are updating your database from Proposal 9.0 or greater, you must back up your database before proceeding. Choose a location for RelProp.zip to reside by clicking the *Browse* button. Then, click *Start Backup*. New installations will skip to Step 4.18.



4.15 When the backup has completed successfully, click the *OK* and *Close* buttons.

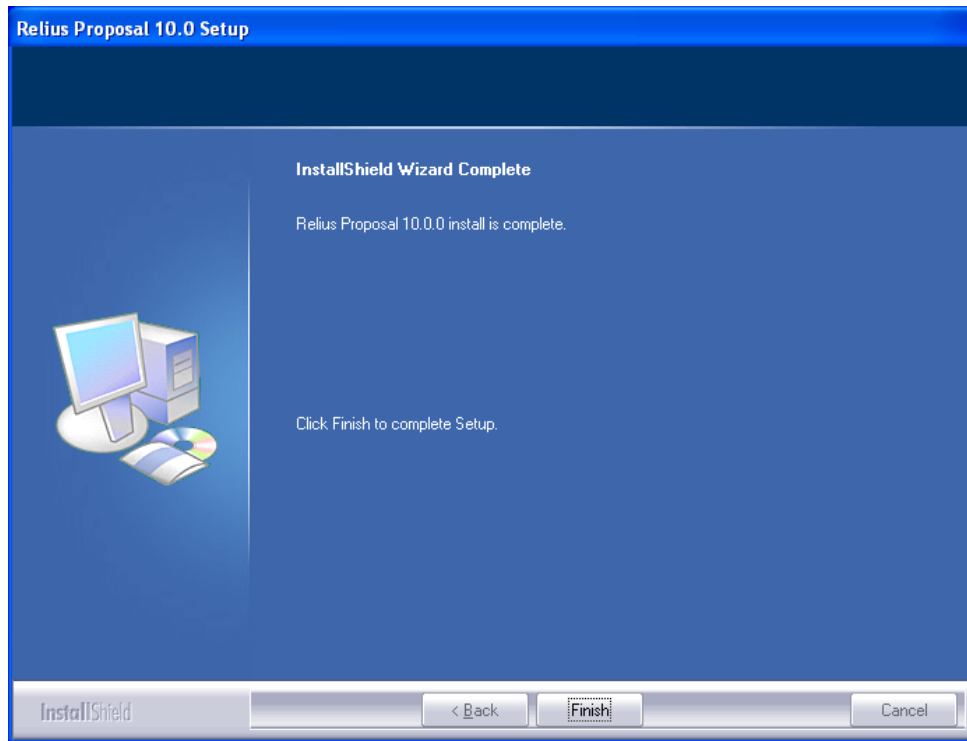


4.16 The database will be updated to the new version. Do not interrupt the process.



4.17 A text file will appear on your screen outlining the latest features of Relius Proposal 10.0. Once you have finished reviewing it, you may close it. For later reviewing, you can access it where the program files are located.

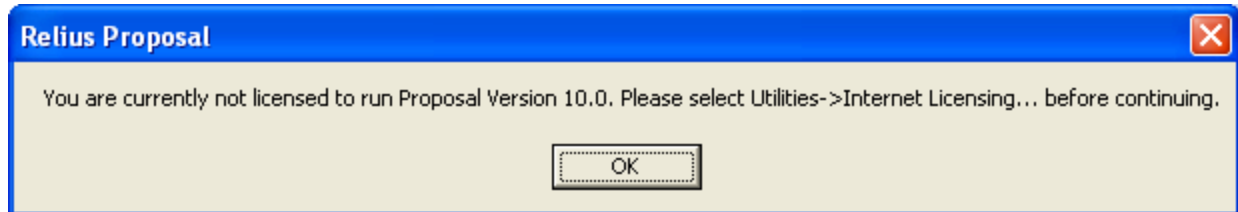
- 4.18 The final screen will look like the one below. If prompted to reboot, **be sure “Yes, I want to restart my computer now” is chosen and click *Finish***. Your workstation will shut down all applications and restart (if necessary). **Do not** interrupt the process.



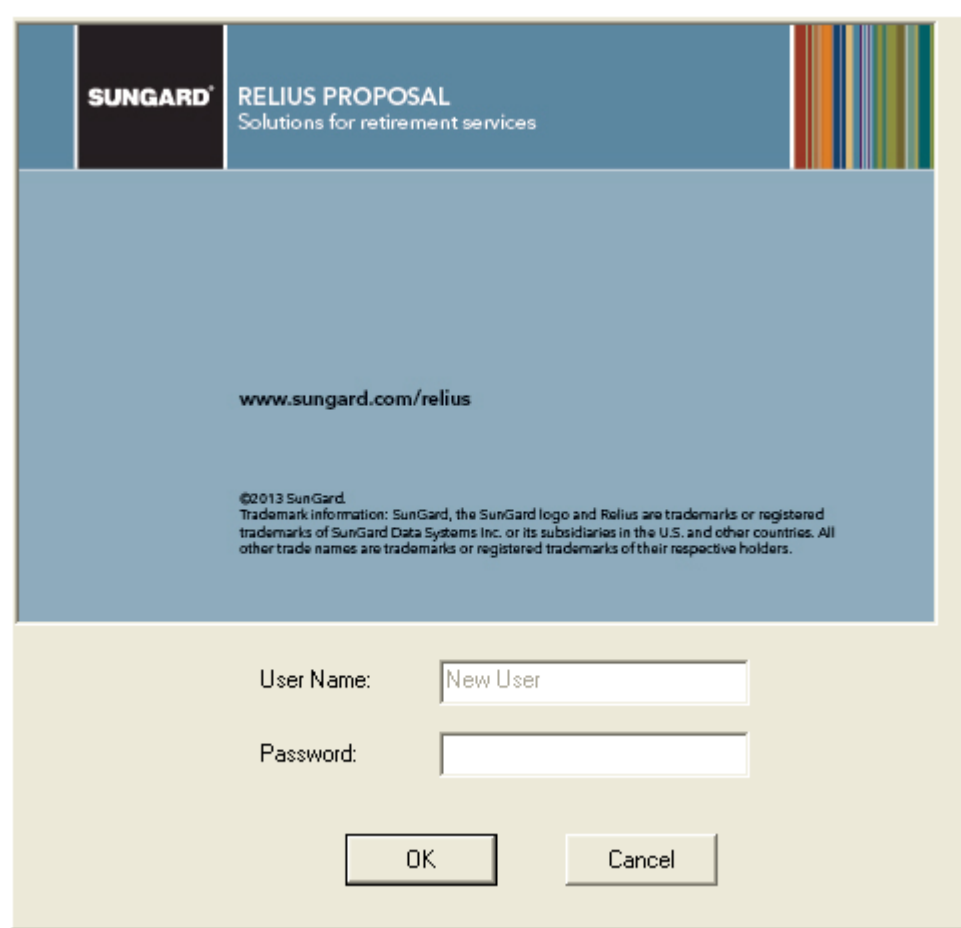
- 4.19 If action was taken in Step 4.2, restore the icons or shortcuts that were temporarily removed from the **StartUp** group or folder. Restart any services (including virus scanning) that were temporarily set to “Manual” and – if necessary – place them back in “Automatic” mode.
- 4.20 Repeat this Section for each workstation, and ensure no users are accessing the system while install is being performed. Networked versions will only have to install a new database or backup/convert the existing database once. For Steps 4.14 through 4.16, subsequent installs can select *Close* if a backup and update were successfully performed during initial install.

5 Licensing Relius Proposal

Licensing for Relius Proposal **must be renewed** at version 10.0. Multi-User systems need to re-license only the first workstation. Each Single-User system must be re-licensed individually.



- 5.1 Open Relius Proposal and sign on as any user that has already been added to the system and click *OK*. New installations will simply click the *OK* button, as the system will default to “New User.” You should receive the message above. Note: A password for “New User” is not needed. If you have forgotten your user name and password, you can sign on as “New User” and then add/edit user information as explained in Step 5.4.



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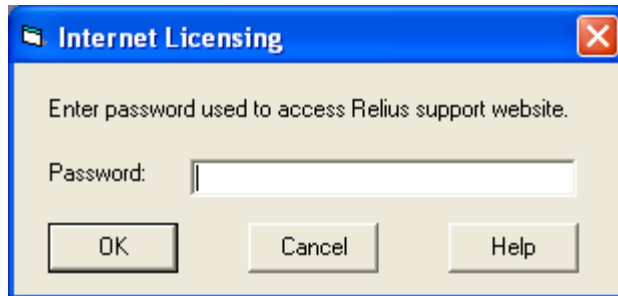
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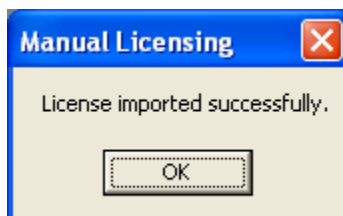
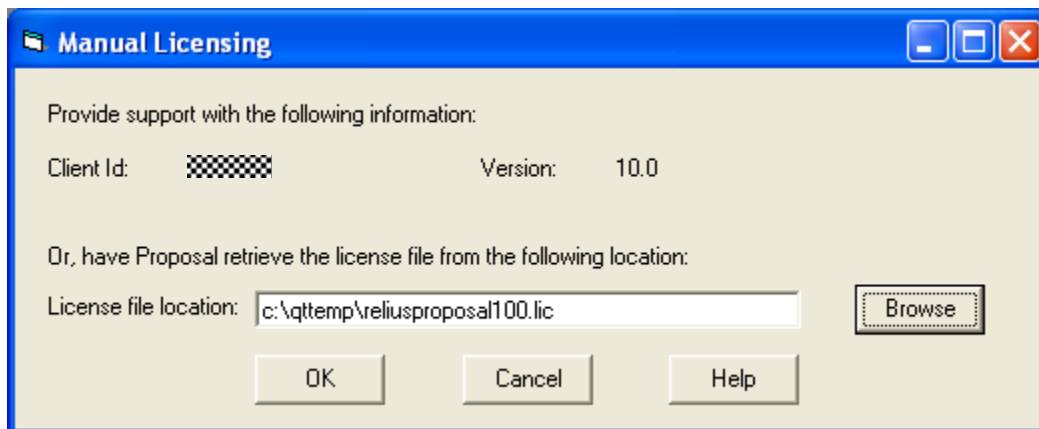
User Name:

Password:

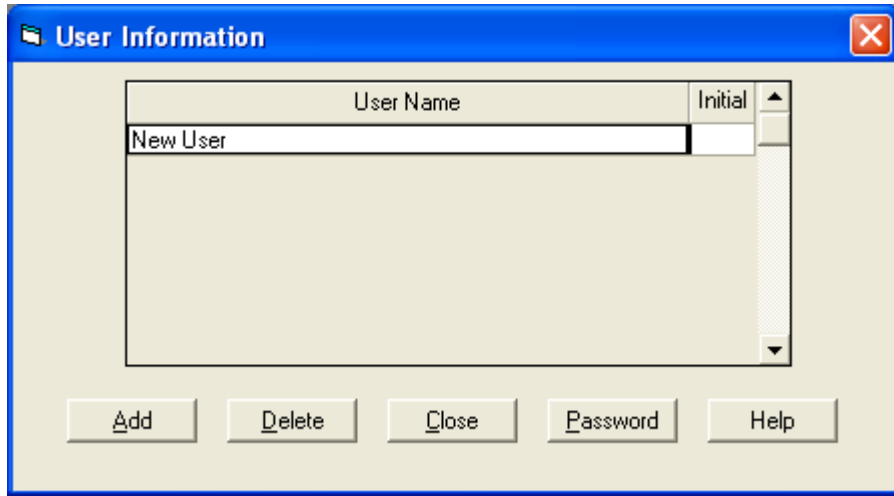
- 5.2 From the main menu, click either *Utilities / Internet Licensing* or *Utilities / Manual Licensing*. If you choose to license across the Internet (recommended), you will be prompted for the password that is linked to your ClientID to access Relius support website, not your company's individual users' passwords. **The password is case-sensitive.**



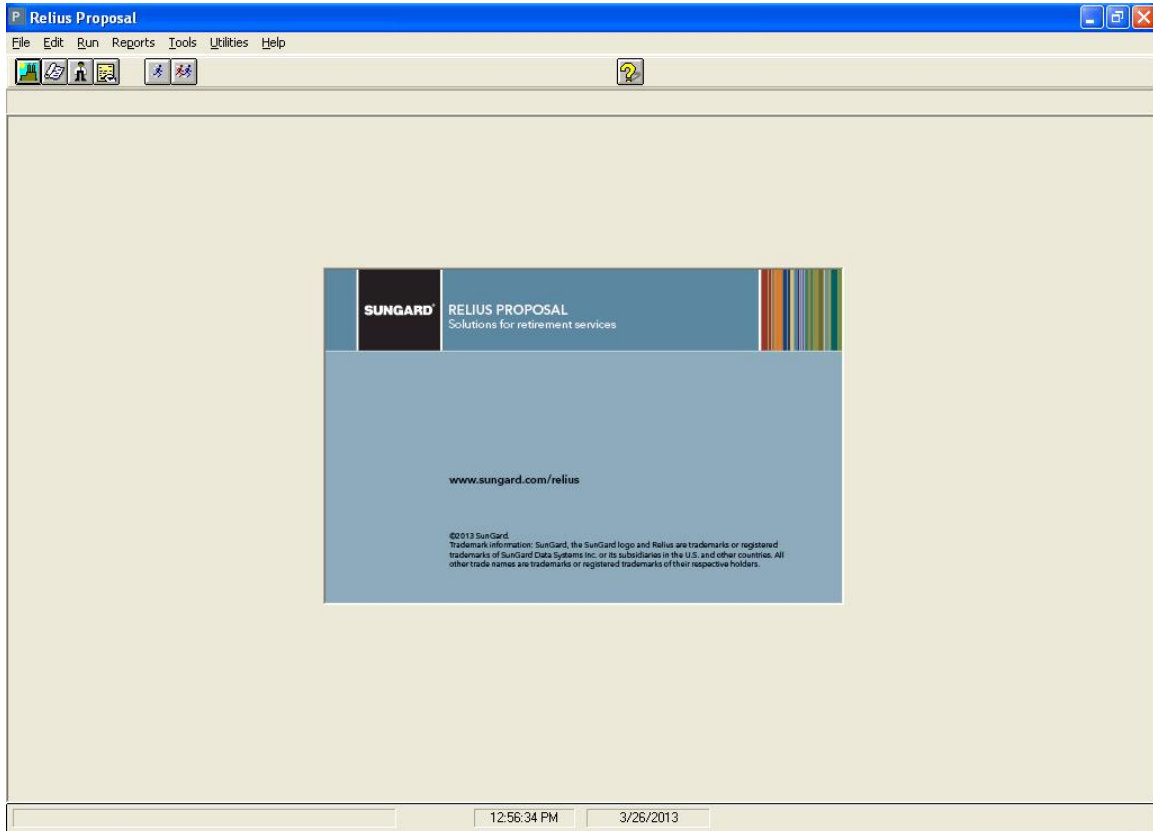
- 5.3 If you choose to license manually, you will need to call Relius Technology Support to receive a license file. To receive this file, provide the Support Technician with the information provided in the Manual Licensing box. Once the file is received, copy that file to a local folder. Click the *Browse* button to find the file, and then click *OK*.



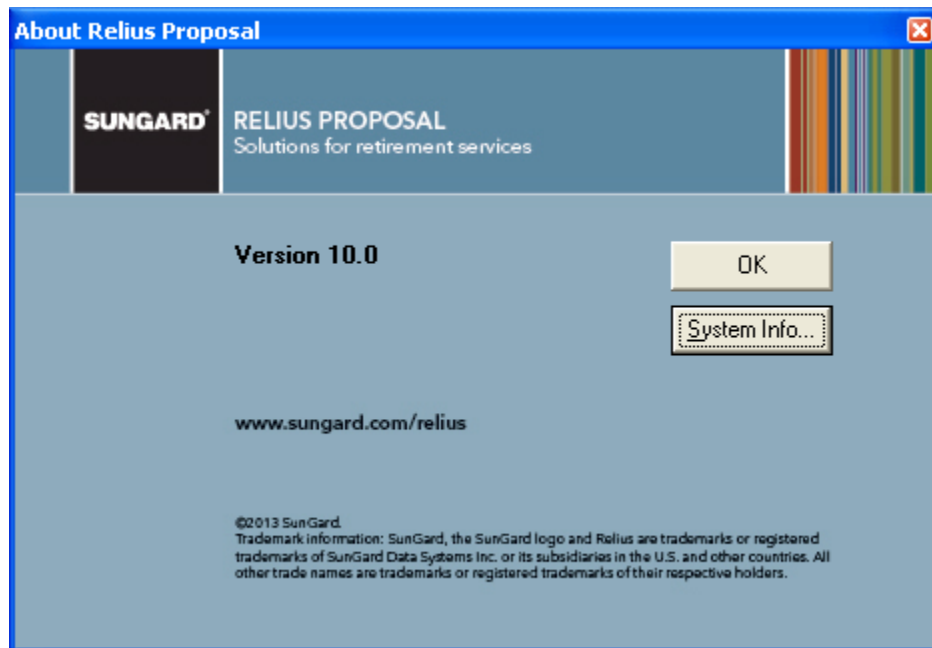
- 5.4 From the main menu, click *Utilities / User Information*. Add the users necessary and assign passwords to each. When finished, click *Close*. You will not be able to modify or delete the “New User.”



- 5.5 When you have licensed your system successfully and created the necessary users, you should have a full array of menu options. However, “New User” will have limited abilities, so you should exit the program and log in as a regular user.



- 5.6 You can verify the version and service pack level by clicking *Help / About* and reviewing the contents of the “About” screen.



Repeat the process of installing this update on each workstation, beginning with Step 3.1. Since the database conversion will need to only be run the first time on a multi-user database, the conversion will not be re-run. The installation program will detect that the database has already been updated, so steps 4.14 through 4.16 will be ignored. **Single-user systems will require the conversion to be run against each database.**

Appendix A System Requirements

Relius Proposal 10.0 Hardware Requirements

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

Printers

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

Appendix B Migrating Data to a New System

When the previous edition of Relius Proposal was released, Windows Vista was still considered by many industry experts as “unstable.” Since then, other editions of Windows have been introduced, most notably Windows 7. As clients continue migrating from Windows XP, it became necessary to update the list of supported operating systems for Relius Proposal.

Migrating your existing standalone Proposal data from an older machine to a new one can be made seamless by following these steps. Please note that if you need further assistance, you should contact Relius Technology Support.

- Install Relius Proposal to your new system. Do not update your old environment if it is to be “retired” from using Relius Proposal. Once the installation has finished, do not launch the program.
- Copy RelProp.mdb from your old machine to the new one. The default locations for the older machine will be C:\Program Files\Relius\Proposal. If the file is not there, or you are unsure of its location, check C:\Windows\RelProp.ini for the DATAPATH= parameter. (Do not place the data file in C:\Program Files\Relius\Proposal. See Steps 4.10 and 4.11 for a full explanation.)
- Re-run the Relius Proposal 10.0 installation so the data can be converted.
- If on a Terminal Server, give the appropriate permissions (Modify) to the RelPropData folder for all users or user groups that will be accessing the program and data.

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