

Version 9.0
Installation and Configuration

December 17, 2007

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1 Overview

Please read the entire document before beginning. **This document covers the installation of Relius Proposal 9.0.** A “downloadable” zip file of this document can be obtained at our web site for offline viewing. 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 9.0 involves the following basic procedures:

- 1) **Read and understand this document.**
- 2) Ensure all workstations to be upgraded have Relius Proposal 7.3 or later properly installed and configured. Otherwise, install the Relius Proposal Component CD to new workstations. (Information on installing the Component CD can be found in Appendix B.)
- 3) Ensure your database has been properly exported and backed up.
- 4) Install Relius Proposal 9.0.
- 5) Set up additional workstations (if necessary).

2 Installation and Environment Considerations

2.1 Installation Methods

Relius Proposal 9.0 is available via download from the SunGard FTP Site (<http://www.relius.net/support/loginform.asp>). Each workstation will require access to the downloaded file. If a network drive is used to install the software, it must be mapped with a drive letter assigned. Running the Relius Proposal 9.0 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 <http://www.relius.net/support/loginform.asp>. 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*” (<http://www.relius.net/support/subscribe.asp>) 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 9.0 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 9.0 will install or operate properly on any given locked-down security configuration. Relius Proposal 9.0 is certified and supported only when run on the default Windows 2000/XP user security settings.

The Windows 2000/XP Administrator (or a user with equivalent Administrator rights) **must** run the installation.

2.5 Unsupported Operating Systems

The following operating systems are not supported:

- Ø Windows 3.1
- Ø Windows 3.11
- Ø Windows 95
- Ø Windows NT
- Ø Windows 98
- Ø Windows ME

For a list of supported operating systems and configurations, see our web site (http://www.relius.net/support/qt_technology.asp). 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.

2.6 Hardware and Software Requirements

All hardware requirements are specified on our web site (http://www.relius.net/support/qt_technology.asp).

- Windows 2000 Professional with Service Pack 4 or greater, or Windows XP (Home and Professional) with Service Pack 2 or greater.
- Appropriate printer driver (HP LaserJet III or greater).
- TCP/IP Network Protocol for multi-user systems. TCP/IP must have a static IP address on the database server.
- Minimum video resolution of 800 x 600 with 256 colors.

2.7 Update Order of Installation

Your workstations and database must be running Relius Proposal 7.3 (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 Relius Proposal 9.0 Update Installation

Pre-installation Notes:

- a) This installation is valid for Windows 2000 Pro and Windows XP. 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 9.0 at a server console will fail and result in the following message:



Clients wishing to install Relius Proposal 9.0 to a Windows Server operating system for purposes of Terminal Server hosting must 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 9.0 installs many of its support files in the “System” directory, normally C:\WINNT\SYSTEM32 (on Windows 2000) or C:\WINDOWS\SYSTEM32 (on Windows XP).
- e) The installation process takes approximately 1/2 hour to complete.
- f) Review the Relius Proposal 9.0 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.
- 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 9.0. 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.

- 3.1 Download the self-extracting installation program (ReliusProposal9.exe) from the SunGard Relius FTP Site (<http://www.relius.net/support/loginform.asp>) and copy it to an easily accessed location. *In these instructions, D:\Temp will be used.*
- 3.2 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.

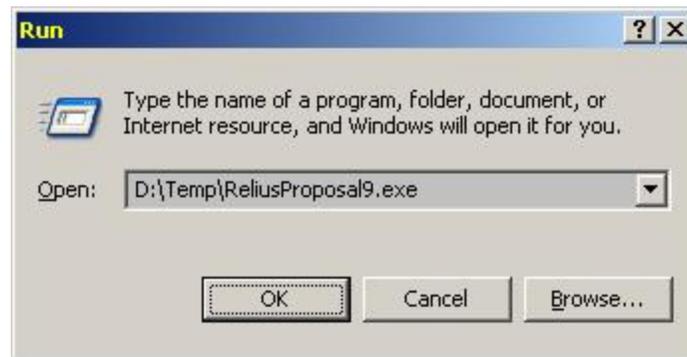
Additionally, programs that are set to launch when Windows is started can also be specified in C:\WINDOWS\WIN.INI. Please **edit** this file using Notepad. Temporarily **remark** the entries **RUN=** and **LOAD=** by placing a semi-colon (“;”) in front of the line (if programs are specified), then **Save**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

;RUN=EXAMPLE.EXE

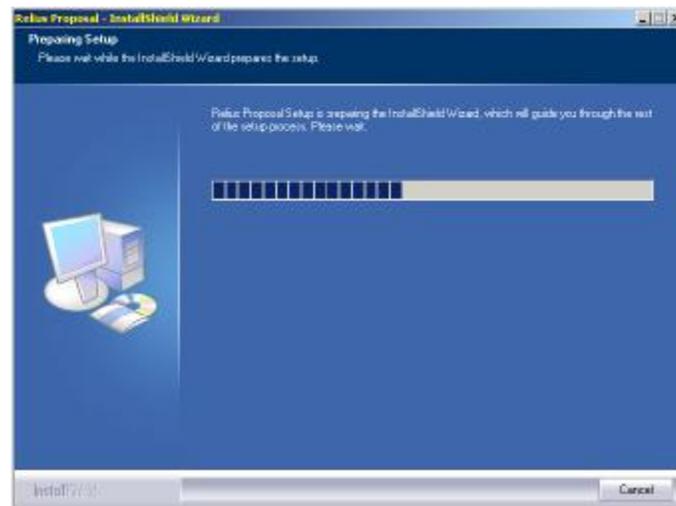
- 3.3 New installations of Relius Proposal 9.0 will require the Relius Proposal Component CD to be run if Crystal Reports 10 is not previously installed. If you receive the message shown below, proceed to Appendix B before continuing.



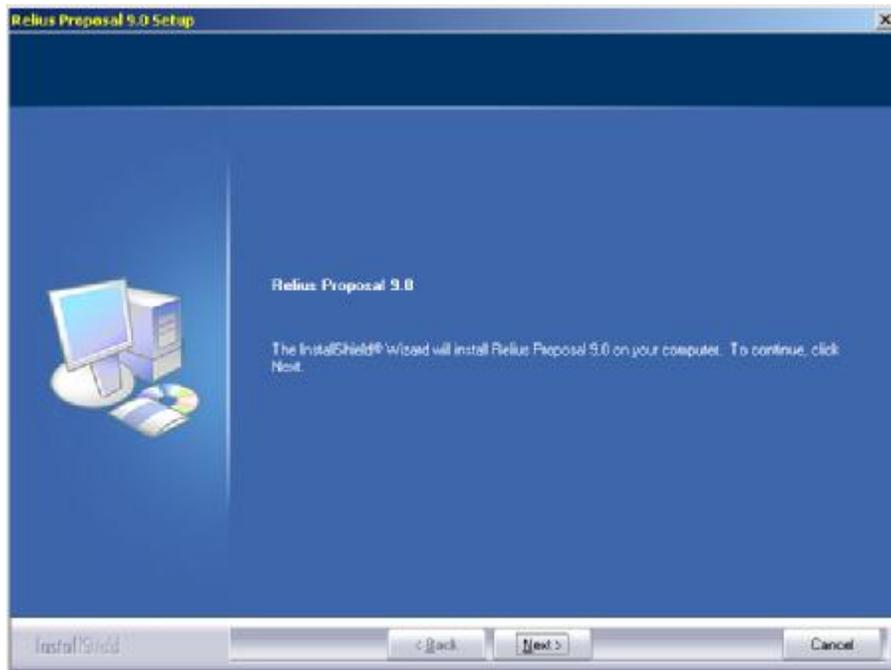
- 3.4 Re-start the computer. Windows or other programs may have locked some files that need to be overwritten during the update process.
- 3.5 Temporarily disable all virus protection.
- 3.6 Click *Start*, then *Run* and type **D:\Temp\ReliusProposal9.exe** in the command box, then click *OK*.



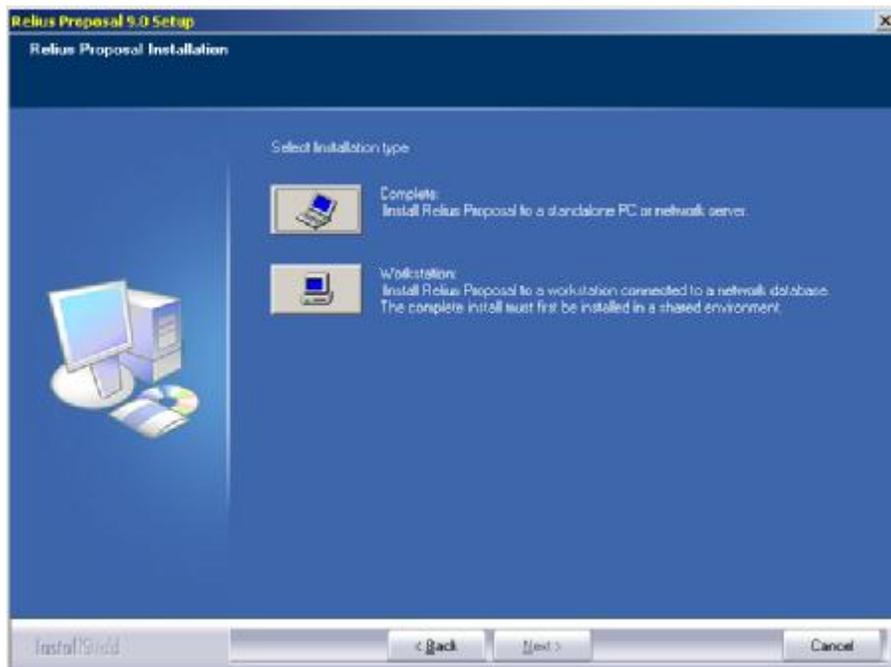
- 3.7 Because this installation is a self-extracting executable, several files will extract and copy to temporary locations for the installation process.



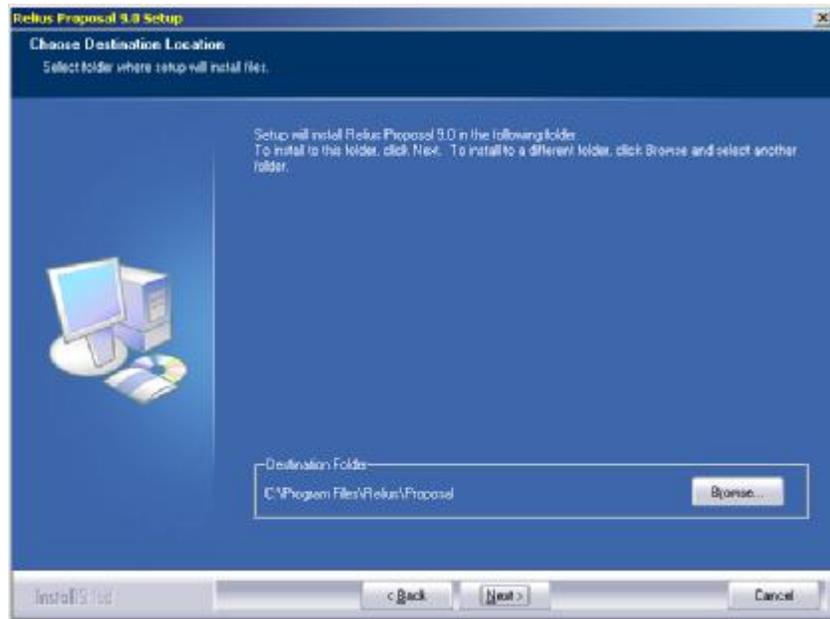
- 3.8 The Relius Proposal 9.0 Setup “Welcome” screen appears. Please note that all open programs need to be closed at this time. Click *Next* to continue.



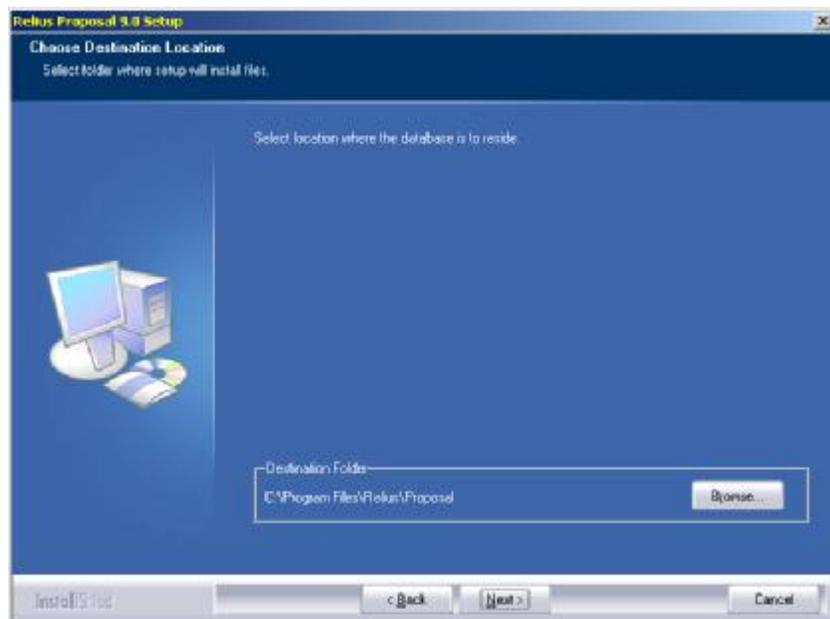
- 3.9 You will be asked to choose the type of installation. Standalone systems and the first PC in a network environment must choose **Complete**. Subsequent networked workstations must choose **Workstation** (but only after the first complete installation is finished).



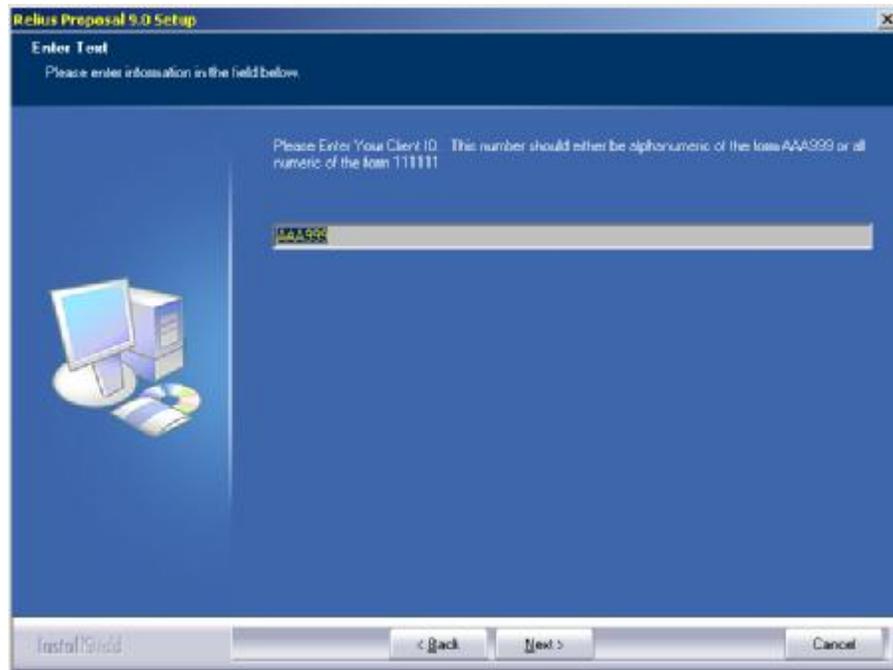
- 3.10 Choose the location of your program files. The default (recommended) location is C:\Program Files\Relius\Proposal. If installing to a network drive, ensure it is consistently mapped for every workstation (e.g., all workstations will map to Z:\Program Files\Relius\Proposal). Upgrades will default to the current settings. Click *Next* to continue.



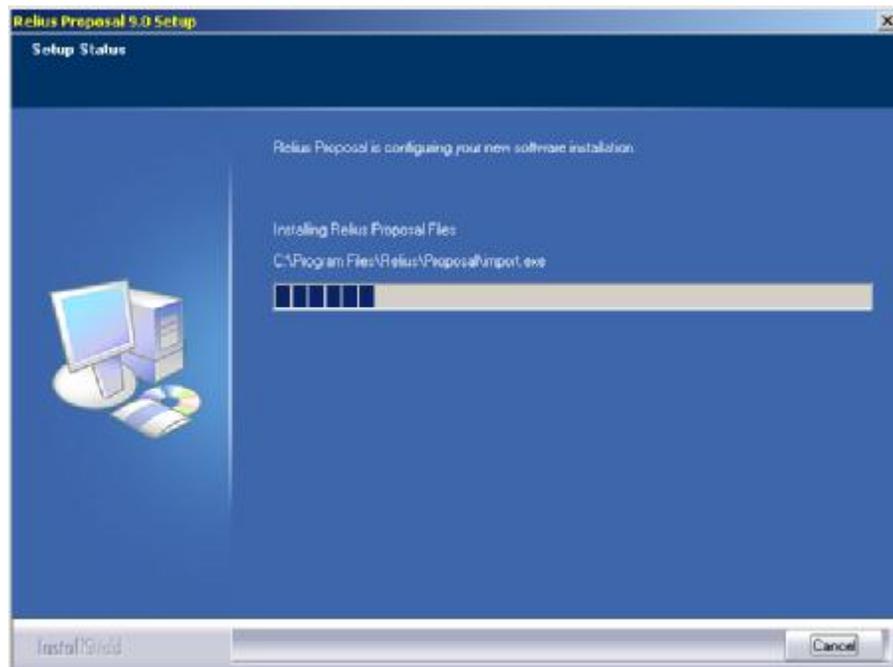
- 3.11 You must then select the location of your database. Please note that the default is the same as the program file location (C:\Program Files\Relius\Proposal; upgrades will default to the current settings.). If you are installing a network database, ensure that the location is accessible by all Proposal users and the assigned drive letter is mapped to each workstation identically.



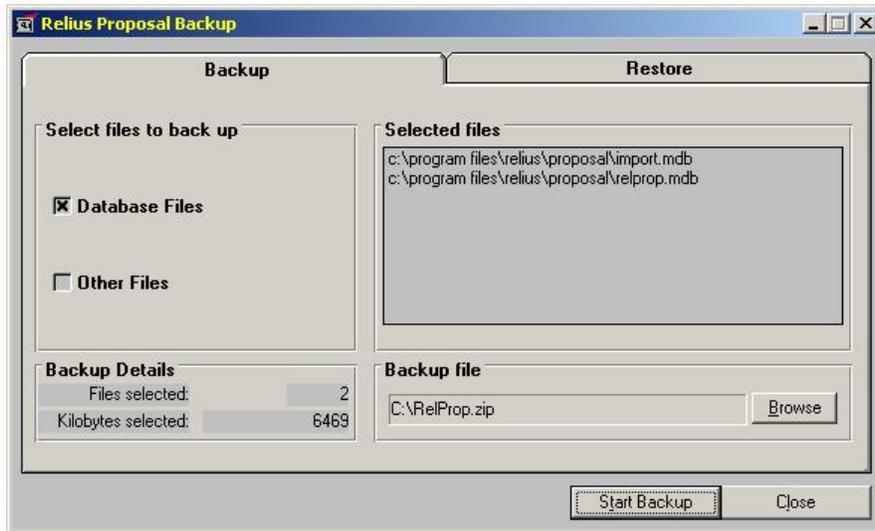
- 3.12 You must enter your alphanumeric ClientID. This unique identifier will allow you to use Proposal with all features for which you are licensed. Systems where Relius Proposal 7.3 or greater is already installed (or any recent version of Relius Administration), will not see this screen.



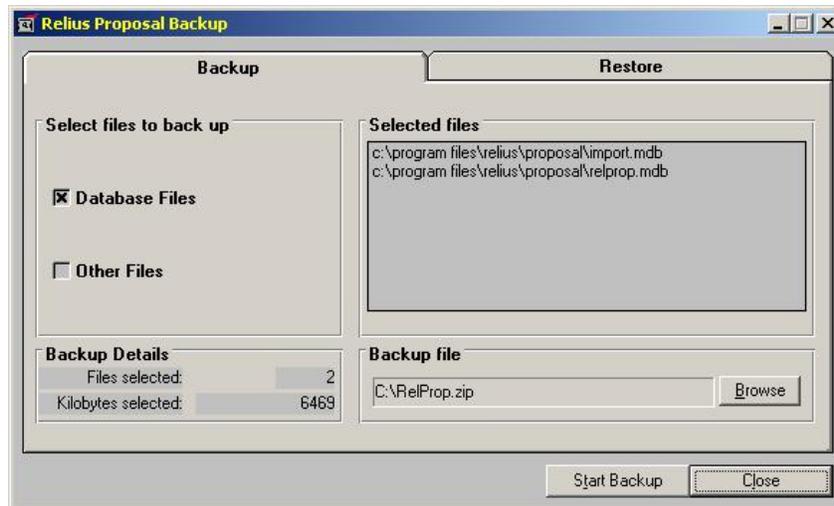
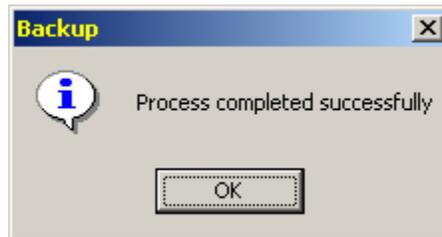
- 3.13 Program files will then copy to the locations you have set.



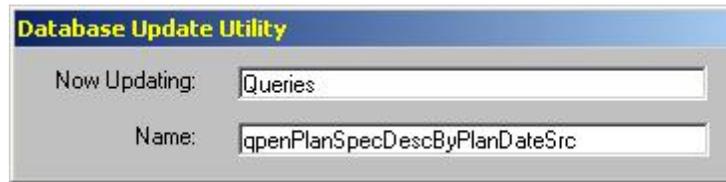
- 3.14 If you are updating your database from Proposal 7.3 or greater, you should back up your database first. Choose a location for RelProp.zip to reside by clicking the *Browse* button. Then, click *Start Backup*. New installations will skip to Step 3.17.



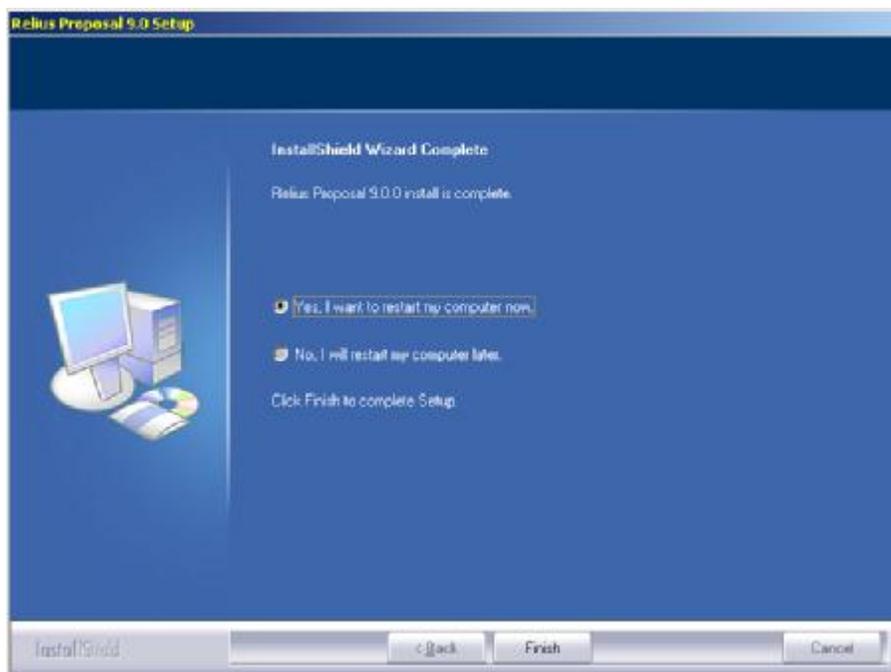
- 3.15 When the backup has completed successfully, click the *Close* button.



- 3.16 The database will be updated to the new version. **Do not interrupt the process.**



- 3.17 A text file will appear on your screen outlining the latest features of Relius Proposal 9.0. Once you have finished reviewing it, you may close it. For later reviewing, you can access it where the program files are located.
- 3.18 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.**



- 3.19 If action was taken in Step 3.2, 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.
- 3.20 Repeat this Section for each workstation. Networked versions will only have to install or convert the database once, so Steps 3.14 through 3.16 will be skipped.

4 Licensing Relius Proposal

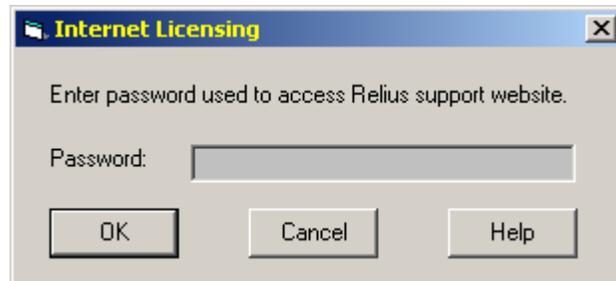
Licensing for Relius Proposal **must be renewed** at version 9.0. Multi-User systems need to re-license only the first workstation. Each Single-User system must be re-licensed individually.



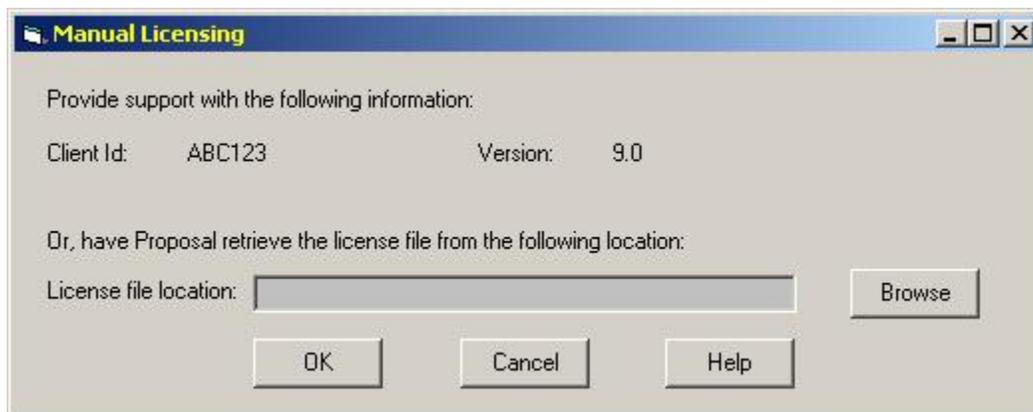
- 4.1 Open Relius Proposal and sign on as any user that has already been added to the system and click *OK*. New installations will simply click the *OK* button, as the system will default to “New User.” You should receive the message above. Note: A password for “New User” is not needed. If you have forgotten your user name and password, you can sign on as “New User” and then add/edit user information as explained in Step 4.4.



- 4.2 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 your password to the SunGard Relius Support Site. **The password is case-sensitive.**



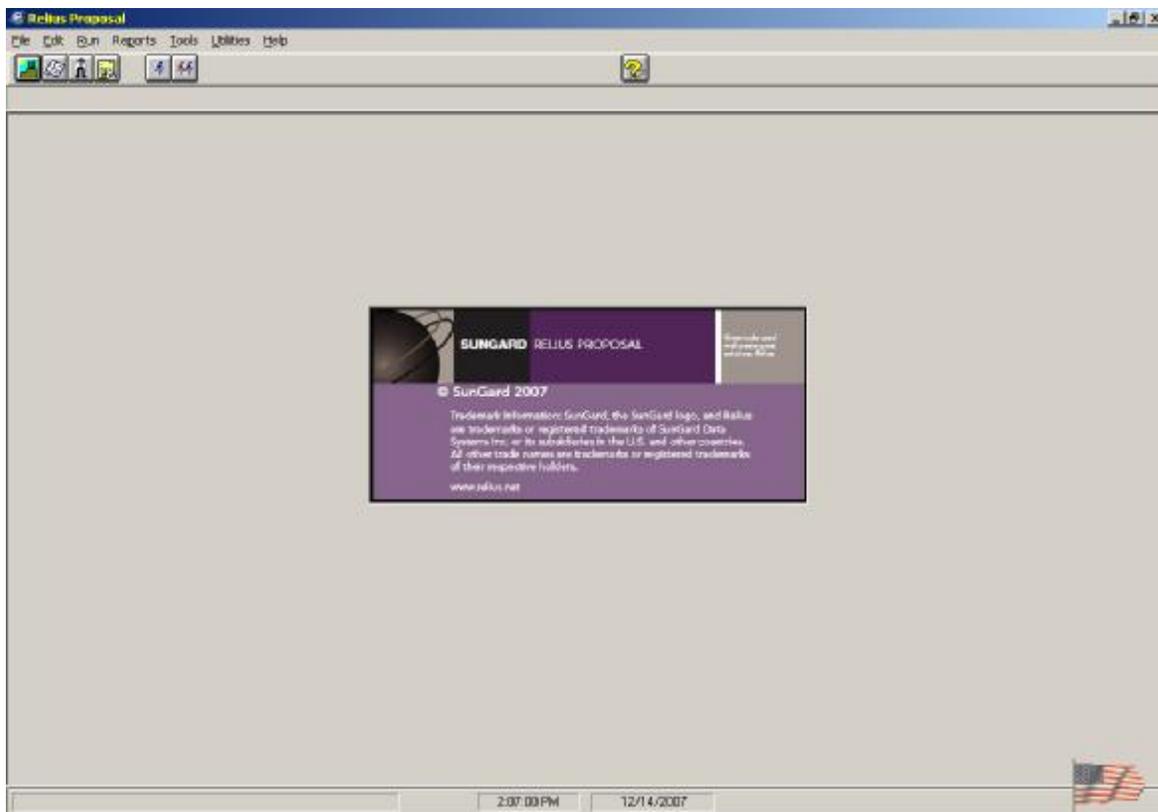
- 4.3 If you choose to license manually, you will need to call Relius Technology Support to receive a license file. To receive this file, provide the Support Technician with the information provided in the Manual Licensing box. Once the file is received, copy that file to a local folder. Click the *Browse*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



- 4.4 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.”



- 4.5 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.



- 4.6 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 3.14 through 3.16 will be ignored. **Single-user systems will require the conversion to be run against each database.**

Appendix A System Requirements

Relius Proposal 9.0 Hardware Requirements

Complete requirements are on our web site (http://www.relius.net/support/qt_technology.asp). 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.

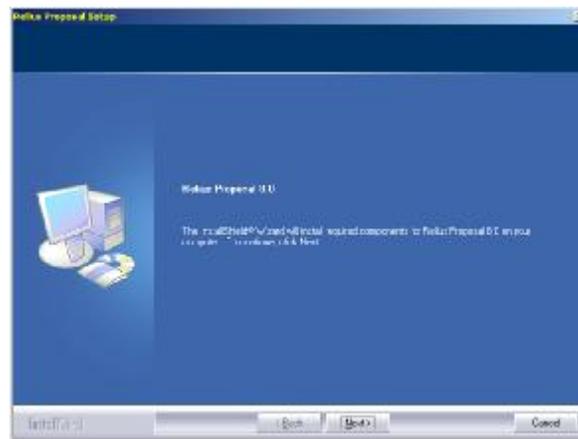
Printers

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.

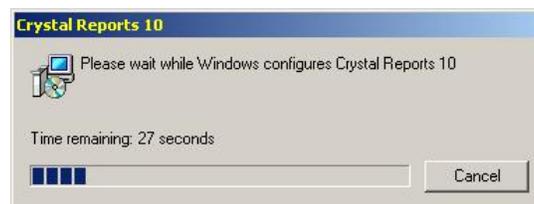
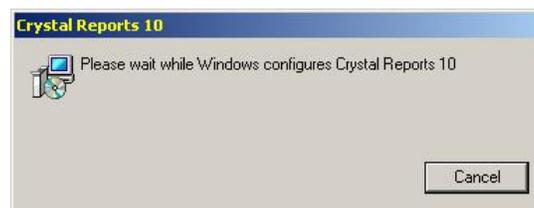
Appendix B Performing the Component Installation

New installations of Relius Proposal 9.0 will require the Relius Proposal Component CD to be run if Crystal Reports 10 is not previously installed. If you need to download the Component CD, log on to the SunGard Relius Web site (<http://www.relius.net/support/loginform.asp>), click *Support*, then *Technology*. Locate the link under “Media Images” to download the *Relius Proposal Component CD*.

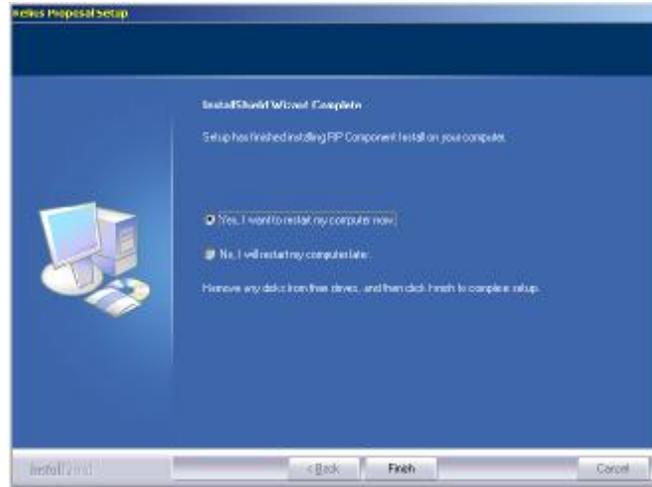
- B.1 If this is a new installation, insert the Component CD into your CD-Rom drive. The installation should start automatically. If it does not, click *Start*, then *Run* and type **<CD Drive>:\Setup.exe** in the command box, then click *OK*.
- B.2 At the “Welcome” screen, click *Next*.



- B.3 The Crystal 10 Installation will launch automatically. The time displayed can be misleading. Do not interrupt the process, as it may take longer than presented.



- B.4 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.



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