Relius Information Availability

Overview

Once you have started processing within Relius Administration, at some point in time you will need further assistance with using a new module, trouble shooting why you are not getting your desired results or you may even need additional training for new staff. When you need that assistance, there are several resources available to a user. These resources are Frequently Asked Questions (FAQs), Help, Quick Start Guides, On-Demand Training, Basic, Daily and Custom Training and User Groups. This document will further detail how each of these options can be of assistance to Relius Administration users.

Frequently Asked Questions (FAQs)

Relius Administration Defined Contribution FAQs are available on our Web site at www.relius.net from the Support > Administration section and contains a wealth of information for those users trying to trouble shoot an issue. Once logged in, there are over 60 different subjects that contain many timely helpful hints and resolutions to common issues experienced by Relius Administration users.

To search for a specific issue, you can click on any one of the available subjects to view FAQs relevant to that subject. Once a particular subject has been selected, user may also search by simply entering a word or phrase and click "search". All subjects matching the search criteria will be displayed. To broaden the search, users may also search all subjects from within the main Relius Administration Defined Contribution FAQs page of the Web site. The same search criteria apply, just enter a word, term or phrase to display related topics.

In the time it takes to enter an incident with Support, either by phone or on the Web, you probably could have resolved your issue utilizing our FAQs section. FAQs really should be your first attempt to resolve an issue.

In addition, you can download quick and easy implementation instructions for new features by going to Defined Contribution FAQs > Setup and Reference Materials.

Setup and Reference Materials

Also listed under the Relius Administration Defined Contribution FAQs on our Web site at www.relius.net, you will find Setup and Reference Materials. The documents in this section contain easy to use instructions on how to implement a new feature announced in the What's New for each version of Relius Administration.

The features are listed by version, simply select the one you'd like to learn more about and the downloaded document will walk you through the implementation process.

Fixes and Pending Issues

Fixes and pending issues can be found on our Web site at www.relius.net on the Relius Administration Support page. Simply click "Download Fixes and View Pending Issues" for the version of Relius Administration you are currently using and you will be directed to a page where you can view pending issues and fixes. In addition, there is also a link on the Support page "Download Web/VRU/CSR Fixes" by version contains information specific to participant, plan sponsor and CSR Web applications.

It is important to frequent this page to see when service packs are available to fix any pending issues identified by Relius Administration. Pending issues as well as fixes are communicated on this page and are categorized by process. Relius Administration also announces enhancements made to the software on this page, enhancements that might have been entered by you or someone at your company. Many times announcements are also posted to this location for information users may need to know for upcoming versions, such as hardware requirements, regulatory issues, etc.

In addition, the following information is available from the Relius Administration Support page:

- New versions of Relius Administration
- Installation and upgrade documentation

Please note, that it is highly recommended that users subscribe to this feature so that they are notified of when Fixes and Updates are posted to our Web site. Instructions on how to subscribe can be found under the Subscriptions section of this document.

Help

From the main menu of Relius Administration there is an entire library of information available at your fingertips you can access from Help > Help Topics > Index. Users can simply enter a word or process and get information relevant to that subject. This is commonly referred to as global Help. This option is best utilized when you are unsure of the starting point in which to search for a process or availability.

The easiest Help to access is when in a particular form within Relius Administration, simply click **F1** for information pertinent only to that form, or click the Help icon in the tool bar and you will have an option for either Help (global) or the process that you are in. For example, if you are in plan specifications and need assistance, click **Help**. You will be presented with three options; 1.) Help Topics (global Help) to search the entire Help library, 2.) Plan Specifications to access topics available, or 3.) About Relius Administration will display what version of Relius Administration you are currently using.

Quick Start Guides

Another feature in Help is Quick Start Guides. Quick Start Guides can be located in Help > Help Topics > Contents > Quick Start Guides. These are very helpful when trying to learn an entire process rather than just a form. As an example, there are several Quick Start Guides available relating just to the Web applications. As an example, the VRU/Web Setup Quick Start Guide outlines and describes each category and option available in VRU/Web Setup. So if you are trying to learn how to enter options in VRU/Web Setup, the Quick Start Guide is a great place to start.

Training Passport Courses

The Training Passport courses are accessed via our Web site under Training and are another tool available to learn more about what Relius Administration has to offer. There are 13 series with over 60 topics covering administration, recordkeeping and reporting. These are designed for all levels of users whether you are new to Relius or have been using the software for years. The great thing about the Training Passport is you can take the courses whenever you like, whether you are at work or at home, you decide. Registrations allow 60 day access to each session and all employees can register for those sessions that best pertain to their job function.

Certification tests that are available once a session series is completed as well as ASPPA and NIPA continuing education credits. Continuing education credits are not available for any free session or sessions less than 60 minutes in duration. As the system grows and changes we work to update or add sessions, so make sure you subscribe to Relius Training for updates and announcements. Instructions on how to subscribe can be found under the Subscriptions section of this document.

For further information, please email Training.coordinator@relius.net.

Training

Relius Administration offers training either on-site or at our Jacksonville location. The types of training offered are:

- Basic
- Daily
- Custom
- Consulting

Basic Training is for new users and covers in-depth how to process balance forward plans with our software as well as how to convert from balance forward to daily valuation plans. Training can be conducted at our Jacksonville location or at a client's office.

Daily Training is for users that process daily valuation plans and includes not only how to do recordkeeping and administration for these types of plans, but also demonstrates how the trading links work for various vendors as well as participant and plan sponsor web applications. Sample processing standards documents are also provided to help you with your internal operating procedures. Daily Training is typically done on-site at a client's office due to travel expenses but can certainly be held in our Jacksonville location at the request of the client.

Custom Training is exactly what it sounds like. You tell us what you need and we will customize the training to meet your needs, then we train your staff. Not sure what you need? Ask us and we can help.

Consulting offers clients the opportunity for an objective and professional review of their internal processes and procedures. Our consultants complete an in-depth analysis and when inefficiencies are identified, recommendations are made to increase efficiency, minimize manual processing thereby reducing financial risk to the client.

Quotes are based on professional time, travel and expenses. For further information, please email Training.coordinator@relius.net.

User Groups

User Groups create a great opportunity for Relius Administration users to meet periodically throughout the year and get training, review upcoming releases and network with other users to help develop business relationships and strategies. Meetings take place at various locations throughout the country.

For more information about user groups and to find a meeting near you, log on to http://www.relius.net/events/ListUsergroups.asp.

Subscriptions

A great way to keep abreast with what is going on with Relius Administration is via subscriptions. Users can subscribe to any number of subscriptions to keep them current on pension updates, Documents, Government Forms, Technology, seminars, training and software updates. *It is highly recommended for Relius Administration users to subscribe to Relius Training as well as Fixes and Updates.* Users may subscribe to any or all subscription alerts from the main Support page under **Subscribe.**