

This guide is designed to help you through the basic functions of the Relius Documents ASP On-Demand system and provide you with important information concerning support and other miscellaneous items.

The guide is not intended to replace a Relius Documents ASP Training Workshop, nor does it cover all of the available features within the system. There is extensive content-sensitive help available to you within the Relius Documents ASP system.

*If you have any problems or questions concerning the Relius Documents ASP system, please call Relius Documents Support at 800-326-7235 to schedule an appointment to be walked through this process.*

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## Register

- [Register](#) to use the On-Demand processing option (you'll only need to do this once).
- After you register, you will receive an e-mail with the login information and be taken back to the Welcome page.

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## Already Registered? Starting Relius Documents ASP

- From your Browser, connect to [www.relius.net](http://www.relius.net).
- Click **Relius Documents ASP**.
- Click **On-Demand (Pay-Per-Plan) Service**.
- Enter your Customer ID, Login Name and Password.
- Click **Log In**
- Check system requirements.

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## The Basic Process

The following steps walk you through creating a project within Relius Documents. A “project” includes your document files as well as checklist files, and all other files that go hand-in-hand with your document.

### Creating a Project

The first step to creating a project is entering data by answering a series of questions specific to your plan.

- Click **Project**.
- Click **New**.
- Select a Product.
  - If you use SunGard’s Individually Designed Plans, choose an IDP product.
  - If you sponsor a PPD prototype or volume submitter, choose an appropriate product that begins with PPD.
  - If you sponsor a Corbel prototype or volume submitter, choose an appropriate product that begins with Corbel.
- Click **OK**.
- You will be taken to "What You Need To Know About Pay-Per-Plan". **Read this page carefully!**
- Once you have agreed to the terms, click **I Agree**.

## Checklist Entry

Questions will appear on your screen that you will need to answer specifically for the employer for whom you are creating the project. This process is called screen entry or checklist entry.

You may use your mouse and keyboard during the process of entering your checklist. Any time that you type text into an insert box during checklist entry, you are allowed to type 500 characters. If your inserted text is more than 500 characters, you will need to modify your document to finish typing your text.

The checklist is displayed in tabbed sections. For example, under the “Document Information” tab, you will see all questions referring to the documents you want to build such as: Documents Required?, Format?, Spacing?, etc.

You may view checklist questions one at a time or view several questions at a time. If you do not know an answer to a question, you can skip it and come back to it later. Once you have answered all necessary questions for a particular section, the tab for that section will have a check mark on it indicating that you have completed all questions associated with that tab.

**Note:** Some of our clients prefer to have a blank printed checklist to use as a guide for entering information into Relius Documents screen entry. If you wish to have a printed checklist, you may print one from within screen entry.

## Naming Your Checklist

You may give your project a name by clicking in the upper-left corner of the checklist entry screen. You have 30 characters in which to do so and you may use letters, numbers, and spaces. Do not include the backward slash (\), the forward slash (/), the colon (:), the question mark (?), or the double quote (“). You will want to give the project a name that will differentiate it from other projects that you create in the future. For example, if this is a Money Purchase Plan for ABC Company, you may want to name the project ABC Company Money Purchase Plan. You have the ability to rename a project, if necessary, by clicking on File | Rename or by clicking on the project name in the upper-left corner of your checklist entry screen and simply giving the project a new name. If you attempt to Submit or Close the checklist prior to giving the checklist a name, you will be asked to provide one.

## Exiting Your Checklist

After you have completed all of your checklist entry tasks, click on the **Close** button located on the button bar. If you have not answered all of the checklist questions, you will receive a message “You have not answered all the required questions... Do you still want to close the project?” You may click No and continue answering the questions. Or, you may click Yes and modify the checklist at a later date. Checklist entry will close and you will be returned to the Welcome page.

## Creating a Document from your Checklist

After you have completed all of your checklist entry tasks, click on the **Submit** button located on the button bar. If you have not answered all of the checklist questions, you will receive a message “In order to submit the checklist, you must answer all the required responses”. If you have answered all of the checklist questions, the system displays the Project Payment Form. Enter payment information, Delivery Type and Document Compression. (**Note:** Some firms do not allow the receipt of e-mails if they have attachments with an .exe extension. If this is the case for your Company's e-mail system, select Delivery Type of FTP or Document

Compression of .zip.) Click Submit. A confirmation message appears to let you know that the Project Payment Form has been successfully submitted. Print this page for your records. Click **OK** to close the Confirmation page and return to the Welcome page.

*If you have any problems or questions concerning creating projects in the Relius Documents ASP system, please call Relius Documents Support at 800-326-7235 to schedule an appointment to be walked through this process.*

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### **About the Relius Documents Support Department – 800-326-7235**

The Relius Documents Support Department's goal is to help you with all of your questions or problems related to functionality.

#### **Hours of Support**

*Monday through Friday 8:30am – 5:30pm Eastern Time*

\*For emergencies, Relius Documents Support provides beeper support 5 days per week. The hours are Monday through Friday 5:30pm - 8pm Eastern Time. Simply dial 800-326-7235 and select the Relius Documents Support option. You'll then receive the Relius Documents Support Department voicemail that will direct you how to activate the beeper. If you do not need the beeper service, you may leave a message on our department voice mail and a Support Representative will return your call the next business day.

#### **Requesting Support**

Request support by doing the following:

Call the 800 number. Have your client name, client number and nature of your problem ready for the dispatcher. Provide as much detail of your problem to the dispatcher as possible as this will better ensure that your problem is sent to the correct support department.

Though call back times fluctuate, Relius Documents Support will always return any call received on the same day. \*\*Generally, call back times are less than 30 minutes to an hour except at peak times. If Support is unable to reach you, we will attempt to page you. When all else fails, we will leave a message on your personal voice mail, your company voice mail or with a receptionist. We will also leave an "Incident" number for you to refer to.

Because of the volume of calls and the length of each support call that come into the queue in a day, once Support has left a message for you, the Support Representative moves on to the next call in the Relius Documents Support queue. After receiving a message, if you would like to speak to someone in Support, you should return the call and refer to the Incident number that was left for you in the message from Support. Your call will then be flagged so that Support knows that you have returned the call. Your call will be a priority and will be returned as soon as a Representative becomes available. Overall, you will be left a minimum of 3 messages over a period of one week. After that time frame, the Support Representative "closes" your Incident assuming that you no longer need our assistance. Support will leave a final message for you to inform you that the Incident is being closed. If you still need our assistance, please call the 800 number, give the dispatcher the Incident number, and your Incident will be re-opened.

Some clients prefer to check the Help file for information regarding their Relius Documents question or problem. You may be able to find your answer quickly and not need to call Support

after all! If you are unable to find the answer you were looking for, please let us know so that we can be sure to ask our Technical Writers to add that subject to the Help file.

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### Instructions for IDP Volume Submitter Approval Letters

To extract the IDP Volume Submitter Approval Letters from the self-extracting .zip file follow these instructions:

- From your Browser, connect to <http://www.relius.net>.
- Click **Relius Systems Login - Documents ASP**.
- Click the [EGTRRA IDP Approval Letters](#) link under the Information heading.
- When you are prompted "What would you like to do with this file?", click the "Run this program from its current location" radio button.
- Click **OK**.
- When the Security Warning screen appears, click **Yes** to install and run VolSubApprovLtrs.exe.
- The WinZip Self-Extractor dialog box will appear. The approval letters will be placed in a c:\VolSubApprovLtrs folder that is created by the WinZip utility. If you wish to extract the files elsewhere, type the drive letter and folder of your desired destination into the Unzip to folder box. Click **Unzip** to extract the files.
- A pop-up message box will appear stating, "15 file(s) unzipped successfully". Click **OK**.
- You will be returned to the WinZip Self-Extractor dialog box, click **Close**.

The files are now on your hard drive in a c:\VolSubApprovLtrs, unless you typed in a different drive letter or folder.

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## **IRS Forms**

Although some forms print with the Relius Documents package, there are other IRS forms that you may find helpful. From our web site, <http://www.relius.net/Contact/Links.aspx>, click on “Forms”.

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## **Relius Documents ASP Training Information**

For free Relius Documents ASP User or Relius Documents ASP Administrator Training, go to <http://www.relius.net/training/listondemand.aspx> and scroll to the bottom of the page.