

## RELIUS CONNECT FOR DOCUMENTS FAQs

### **Question: What is Relius Connect for Documents?**

**Answer:** Relius Connect for Documents is an umbrella term for a collection of Web services used to perform many basic functions of the Relius Documents (RD) application service provider (ASP) system, without ever logging in. A Web service is a virtual interface that allows data to be transmitted from one application to another over the Internet. It accepts pieces of data, analyzes the information to determine which actions to take and then passes on the data to the appropriate area or function of the target system. In most cases, the target system sends data back to the calling system via the same Web service.

Relius Connect for Documents currently includes access to the following Web services:

- Data Import: Sends XML data to the RD ASP system to set up new projects or update existing projects
- Data Export: Extracts data from RD ASP in XML format for use in an external system
- Document Build: Requests to have documents generated and delivered to a specified e-mail address or FTP site
- Get Projects/Products: Requests lists or information about one or all of your Relius Documents projects and licensed products

### **RELIUS DOCUMENTS ASP**

#### **Features**

- Performs back-up services
- Provides operational redundancy to help ensure business continuity
- Offers extensive validation logic during the document generation process
- Provides IRS-compliant plan documents and supporting forms packages
- Links to Relius Administration and Relius Government Forms

#### **Benefits**

- Helps save time spent on installing software and language updates
- Helps reduce the costs of maintaining hardware
- Customizes documents to suit specific business needs
- Helps save time involved in researching and drafting plan documentation

### **Question: What can Relius Connect for Documents do for my company?**

**Answer:** Relius Connect for Documents allows you to cut down on redundant data entry by automating the flow of information shared between Relius Documents and many of your other applications. It also opens up a wide range of possibilities for creating your own, custom document generation application to suit many different types of business needs. If you would like to become more efficient in the ways you collect and share data across your business and/or you are in search of a single source for all your document creation needs, consider Relius Connect for Documents.

### **Question: What are some examples on how to use Relius Connect for Documents?**

**Answer:** When you consider that Relius Documents ASP is capable of collecting any type of data for the purposes of generating virtually any type of logic-driven document, how you use Relius Connect for Documents is really limited only to your own business needs and imagination. Some practical examples of the ways Relius Connect for Documents can be leveraged include:

**Automated Plan Setup** — Creates a Website that collects as little or as much data needed to setup a plan within Relius Documents or other applications, such as a recordkeeping system. When users submit data, it can be combined with default selections and used to generate any necessary documents, such as adoption agreements, supporting forms, service agreements, etc. At the same time the plan is created in RD ASP, the data can be exported automatically in XML format for consumption by other systems.

**Custom Document Generation** — Creates a Website that collects data for the purposes of creating and delivering document packages specific to your office procedures or business practice, such as policy documents, agreements, contracts, forms, guides, lists, certificates, etc.

**Central Data Access Point** — Creates an application that retrieves and displays data from RD ASP in real-time. Allows users to quickly access information and possibly make updates that can be sent automatically back into RD ASP and any other systems connected to the application.

**Question: How can we start using Relius Connect for Documents?**

**Answer:** To start, you need to determine how Relius Connect for Documents can meet your needs best. If you already have a good idea as to what you would like to accomplish, and the programming resources to make it happen, all you need is a license for the Relius Connect for Documents module to begin coding against the Web services. If you would prefer that SunGard oversee or control the implementation and development efforts, SunGard's staff of system experts and developers can deliver custom development services to help you meet your goals quickly and effectively.

**Question: What does Relius Connect for Documents cost?**

**Answer:** The solution's cost depends on how you plan to use Relius Connect for Documents and what custom programming (if any) is required to meet your needs. A detailed quote is provided to you after how you would like to use Relius Connect for Documents is defined.