Options in CustomText Version 2017.3

Empowering the Financial World FIS

Options in CustomText

Areaid:	SectionID	Description
Participant/Sponsor/Advisor Login	OPTPARTICIPANT, OPTSPONSOR, OPTADVISOPR	Removing these labels in the login page will resize the dropdown to not include.
Common	ADVISORLANDING, SPONSORLANDING, PARTICIPANTLANDING, PARTICIPANTDEFAULT, SPONSORDEFAULT, ADVISORDEFAULT	These are the default landing page after successful login. You can change the default landing page here by changing different aspx page (i.e. editperson.aspx).
Common	CSSOVERRIDEPREFIX	Useful in a plan level over-ride. Enter you css file prefix here to override the site level for single plan or plan group. i.e. MINTJULIP
Common	CsrByPassEnrollment	Optional value (N/Y). When Y, the web will allow the user to bypass enrollment. Same logic as sponsor bypass enrollment.
Common	CSSDVC	Same as cssoverrideprefix above except these used in DVC css.
Common	JAVASCRIPT	This area was added to allow you to add your own javascript code here.
Common	PlanStatCdCountYN	Optional value (N/Y). When set to N, the web will skip a count for EE status. This option should be use for plans that has a large EE count and you don't want to show the Categories / EE status page. This will improve Sponsor load time since we are skipping the EE status query. The downside is the categories page/menu will not be available.
Common	SSOCONTROLOPTCD	Optional Values (N/Y). When set to Y, the web will disable the userid password option in enrollment. The assumption is the SSO does not need userid and password in the relius system.
Common	SUPPRESSPSPLANSELFORSSO	Option values (N/Y). When set to Y and during SSO, will hide the plan selection menu. Note: Planid must be supplied during SSO.

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Common	WebClienLinkYN	Optional values (N/Y). When set to Y, the web client link will be available to SSO into 5500 government forms site.
Common	SECURITYEXCEPTIONURLS, SECURITYSCRIPTSRCURLS	Enter allowed URLs where to white list outside websites to interact with Reliusweb.
Edit Personal Information	IDONOTHAVEEMAIL	Remove label text will remove checkbox also on the web.
Guided Enroll – Edit Personal Information	IDONOTHAVEEMAIL	Remove label text will remove checkbox also on the web
Contributions, Elections, Conform to Target	VWISEOPTCD	Optional values (N/Y). Options to enable disable vWise menu items.
Investment Information, Sponsor Investment Information	PERFCOL1 – 7	These texts are for the table column headers. Removing these text will remove the table column.
Override Menu Landing	HTMLINSERT1 – 2	These texts will show on a page when 2 links are setup under one menu item. When a user clicks on the link to open a new window, the content would show a blank section. You can enter text where to not show a blank content.
Sponsor Summary By Investment	LBLPLAN, LBLPLANCONTACT, LBLPLANCONTACTFILE, LBLPLANYR, LBLTPHVCD	Removing these texts will remove

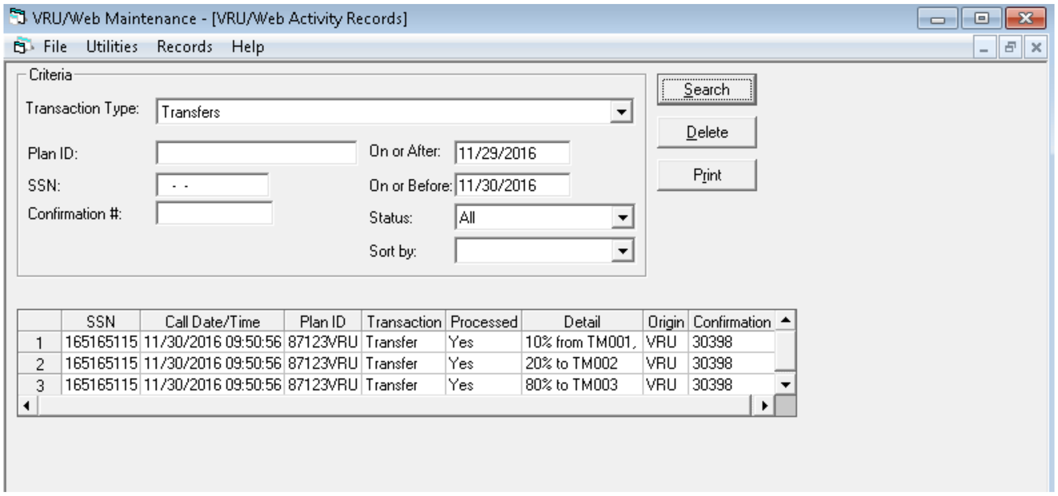
Email Confirmation Customization tips

It is possible in Relius to customize the email notification that are sent out as part of the create web transaction process. Its highly recommend that you have a programmer do these changes for you. Here are the tips on accomplish this.

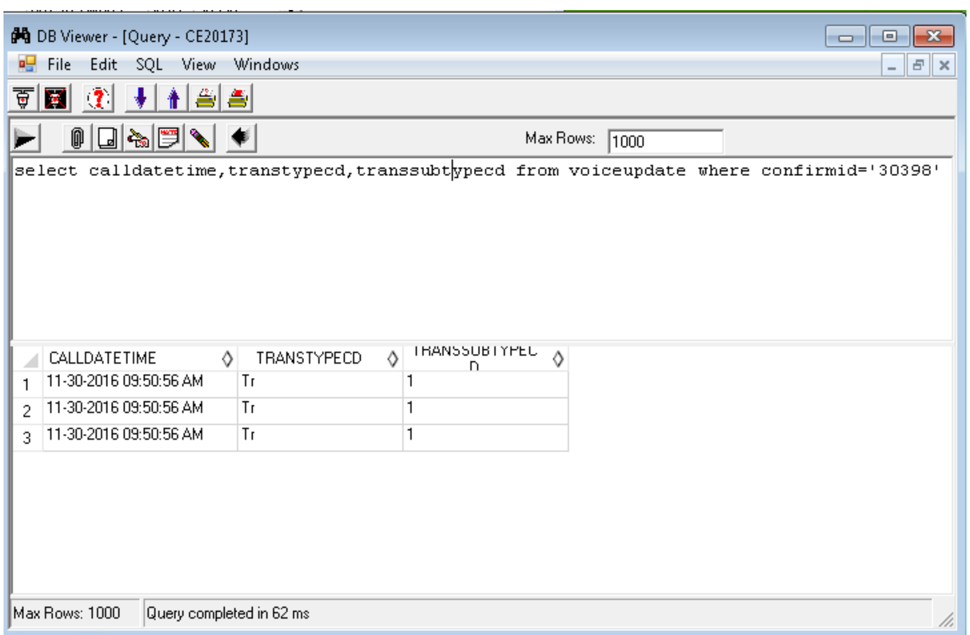
1. Go the the standard report writer reports directory (typical location: c:\program files (x86) \ Relius \ Admin \ Reports). There should be two files that you will be modifying. UVRUTRANHTML.XSL and UVRUTRANTEXT.XSL. There are two version of the file. The HTML version will send the email out in html format while the other file type will send the email in text format. You will want to modify both to account for both types of email.

2. Before you began, you should be familiar with the type of transaction you want to modify. The .xsl file was program with the transaction type coded in relius. You will want to match the Relius transaction code with the user translation.

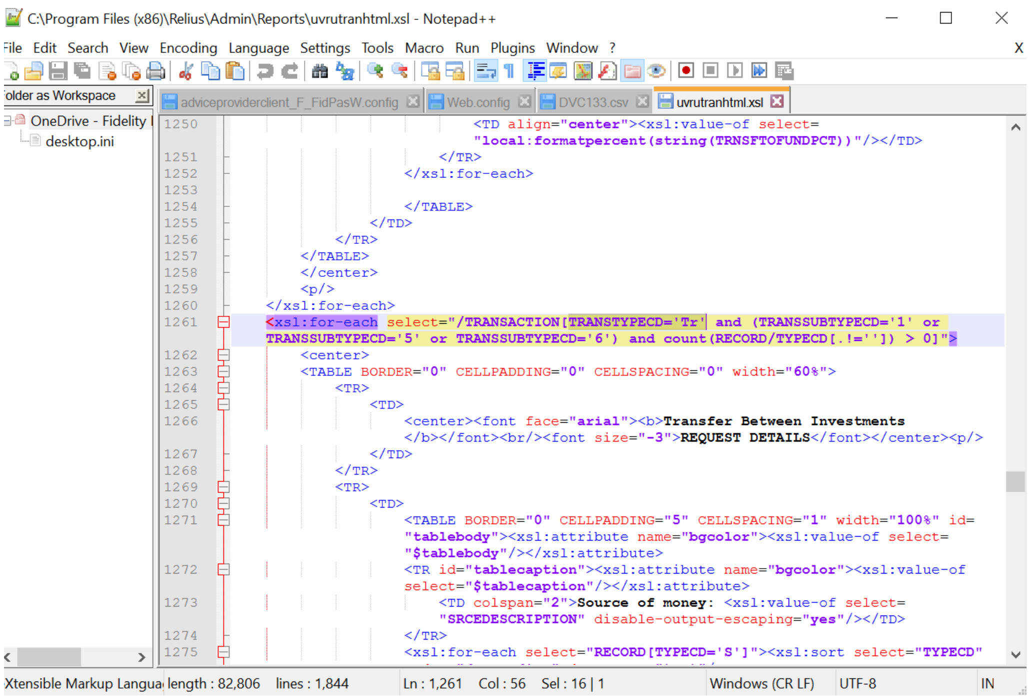
3. Go to Utilities \ VRU Web Administration \ Maintenance. Than go to Utilities \ VRU Web Activity Records. Search for the transaction you want to modify. In the example below it's the transfer transaction. Take note of the call date/time column.



4. In DB Viewer, run the following script (or something) to find your record(s).
`select calldatetime,transtypecd,transsubtypecd from voiceupdate where confirmid='30398'`



5. Now that you know the transtypecd you are ready to modify your uvrutranhtml and urutrantext.xsl. Open one of these files in notepad and do a search for the transaction type you want to modify. In this example, we are searching for TRANSTYPECD='Tr'.



6. You should be able to modify your test you want to show in your email notification. You can change “Transfer Between Investments” to “My Customtext”, etc. You can also remove items you do not like in the css.
7. For advance customization, you will want to consult a programmer. As example, you can add a logo to your email or change the CSS colors of your tables.
8. Once you have modified the files, you can place your files in the custom reports directory. This will ensure that any future update, these files will not be over-written. There is logic in the create web transactions program to look for the uvrutranhtml/text.xsl in the custom directory folder first.