Retirement Mobile App for Relius

For Public Consumption
Last Updated: December 10, 2019
Relius Administration

Empowering
the Financial World

Relius Administration Support
800-326-7235
http://relius.net/support/

Contents

Overview

The FIS Retirement Mobile App enables retirement plan providers to provide participants direct access to their account information anytime, anywhere on their mobile device.

Simple and intuitive navigation: The mobile app provides the functionality participants desire and need to conveniently manage their money in real time and track portfolio values 24 hours a day. A simple interface, optimized navigation and touch-ID capabilities allow participants to quickly and easily access plan information. The mobile app includes:

- Dashboard display of account balance, contribution and rate of return
- Ability to drill down to view details for the account
- Access to personal information to ensure accuracy
- Multi-factor authentication, including native biometric functionality of the mobile device for quick and secure access

Customized branding: Providing participants with a visually consistent and clear user experience is important. The FIS Retirement Mobile App can be customized with your specific brand logo, color scheme, institution-specific privacy policy and a mobile-specific participant agreement.

Licensing for the Mobile App is required. Additional communication regarding availability, licensing, fees, and implementation will be communicated in early May.

IMPORTANT: The Setup Requirements section below will provide instruction for the prerequisite setup of an App store account with Google and Apple. If you do not already have an App store account, one will be needed to deploy the Relius Mobile App. (Licensing is not needed in order to complete this process.)

Setup Requirements

Before Getting Started

Before using the Relius Mobile App functionality, you must first

- Obtain licensing for Mobile App - contact your sales manager
- Establish an App Store account with Android
  - Technical instructions are available here: https://relius.net/MobileHelp/Topics/Index.Aspx?topic=GoogleDeveloperAccount
- Establish an App Store account with Apple.
  - Technical instructions are available here: https://relius.net/MobileHelp/Topics/Index.Aspx?topic=AppleEnrollment#AppleDevProg
- Setup Android Firebase (required). To utilize push notifications to the app, establish and setup a Microsoft Azure account
  - Technical instructions are available here: https://relius.net/MobileHelp/Topics/Index.Aspx?topic=PushNotification
- Identify if you are a Relius Administration ASP or installed license client – there are certain sections where Relius Administration support will be required to assist if Relius Administration ASP client
- Review this entire Quick Start Guide for information on Mobile App setup and configuration
  - Logo setup
  - Global web options
  - Mobile App custom text
  - Plan level web settings
  - Single sign on support
  - Certificate generation

Create Apple and Google Accounts

An app store account is required in order to deploy and make the Retirement Mobile App available to your clients. If you do not already have an app store account established, please refer to the links below to establish an Apple and Google account.

- Instructions for enrolling as a Company for The Apple Developer Program are available here: https://relius.net/MobileHelp/Topics/Index.Aspx?topic=AppleEnrollment#AppleDevProg
- Instructions for setting up a Google Play Developer Account are available here: https://relius.net/MobileHelp/Topics/Index.Aspx?topic=GoogleDeveloperAccount

Create Microsoft Azure Account (Push Notifications)

The Mobile App push notifications use Microsoft Azure Notification Hub to deliver the notifications. If you wish to use push notifications, you must establish a Microsoft Azure subscription and configure the Azure notification hub for different mobile platforms. You must also configure Android Firebase Cloud Messaging and create an iOS Push Notification Certificate. Go to https://relius.net/MobileHelp/Topics/Index.Aspx?topic=PushNotification for technical details relating to the Azure, Android and iOS requirements associated with push notifications.

Licensing

To turn on Mobile App functionality, you must first obtain licensing. Many of the features related to Mobile App are not available for selection until licensing is enabled. Contact your sales representative for licensing information.

Information You Must Provide to FIS To Get Started

	Description	Android / iOS	Comment
1	App Title	Both	**50** characters max. This is the name of the App that is most prominently displayed in the app store and that will show up in search results. Only the first 19-30 characters may be visible depending on the screen size.
2	App Short Description	Android	**80** Characters max This is the short description that shows up under "About this app" in the app store.
3	App Long Description	Both	**4000** Characters max This is the long description that shows up under the short description in the app store.
4	Developer Email Address	Both	This is an email address that would be visible to participants in the app store to email for questions related to the app. This should be the sponsor or TPA participant support email address.
5	Contact Information	Both	First Name, Last Name, Contact Phone Number, Developer Email Address (used to contact in case of queries during app scan)
6	Privacy Policy URL	Both	This needs to be your privacy policy. The privacy policy needs to be a URL that will be visible as a link in the App Store. It is a requirement to publish the App. A privacy policy page has been added to Participant Web and is accessible via a link from the Login page. The language on this page is customizable through custom text. It is possible to suppress the link from displaying on the Login page by removing the text (in custom text) for the privacy policy label. Clients are not obligated to use this new URL for this purpose – it is acceptable to use any URL for your organization that contains the necessary privacy policy applicable to participants using the App or participant web.
7	Logo	Both	Icon Logo (Minimum) - 1024 x 1024 pixels Splash Screen (Minimum) - 2732 X 2732 pixel Global Logo SVG (Preferred) - Horizontal Logo Image - Max Size: 50 kb. Global Logo (if SVG not available) - PNG or JPG format
8	Theme Name	Both	Default theme name. Choose from: • Emerald Pine (default) • Smooth Gray • Mint Julip

			• Sugar Plum • Citrus Rain • Sand Dune • Atlantis Blue
9	Client ID	Both	This is used to determine what web site your app will connect to pull data.
10	Participant Web URL	Both	This is the participant web URL that the participant would be directed to in certain cases for options not yet supported in the App such as enrollment. Refer to the Relius Web Security Certificate technical guide at https://relius.net/MobileHelp/Topics/Index.Aspx?topic=CertUtility.

Excluded Plans

At this time, Mobile App is supported for participant directed defined contribution plans excluding 403(b) / 457 plans set up in Relius as contract coordination plans.

Installation of the App

FIS will package and deploy the Mobile App into the Google and Apple stores on behalf of clients.

Supported device versions

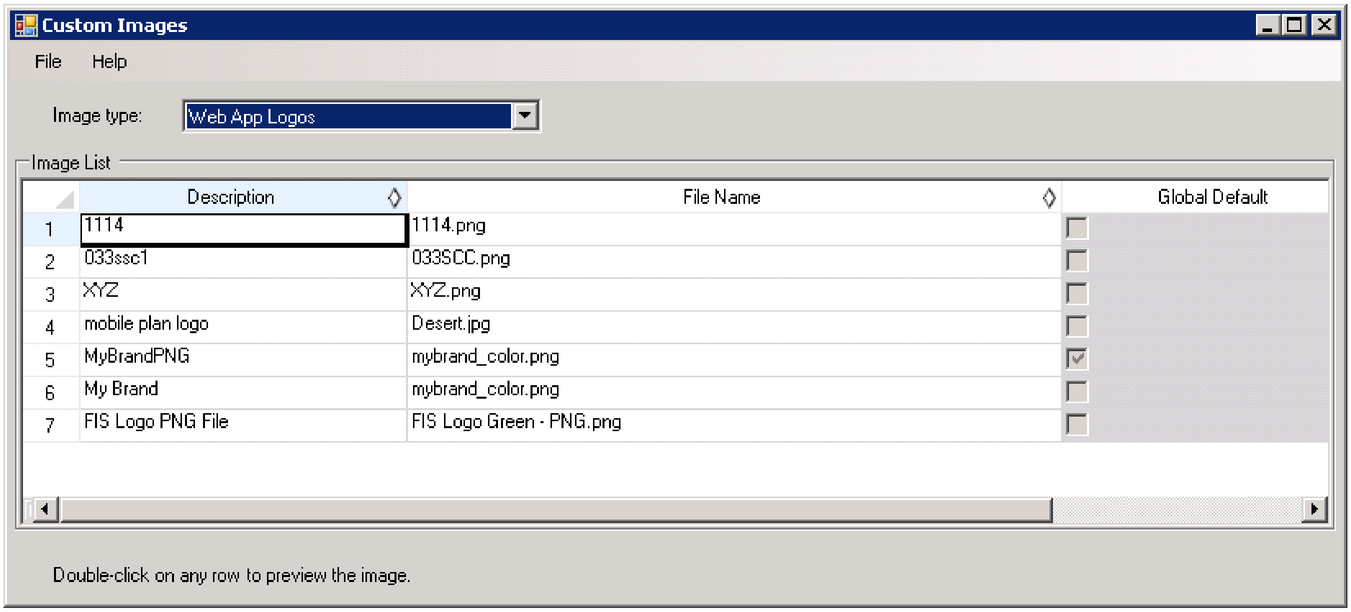
The mobile app is supported for devices operating on the following versions:

	Minimum Supported version
Android	API level 19(KitKat)+
iOS	11.0+

Logos

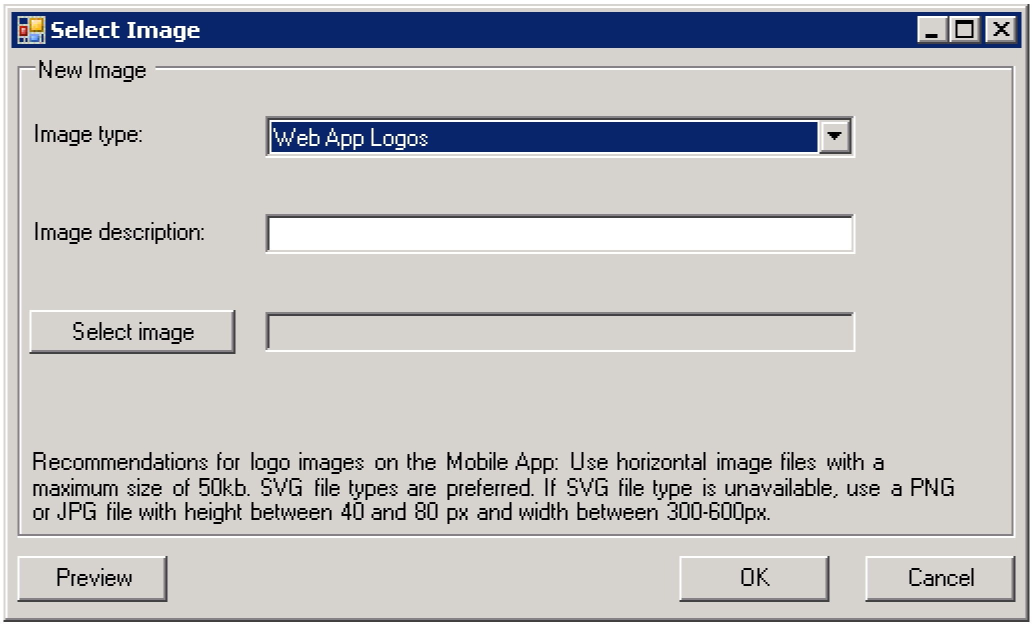
Mobile App supports two types of logos that can be shown once the App is launched: TPA/Client level logo and Plan level logo. Before these can be assigned at the global level or the plan level, the logo must be added to the database in the Custom Images interface.

From the main menu of Relius go to Utilities > **Custom Images** and select "Web App Logos" as the image type as shown below:



To view an existing logo, double click on a row.

To add a new app for use on the mobile App, click on File > Add:



The global default logo is the logo that shows inside of the App before a plan is open. This default is set in Web Options. The global App default checkbox in this interface allows the user to quickly view the logo assigned for this purpose.

Global Web Options Used by the App

Mobile App tab

To access global web options from the main Relius menu, select Utilities > VRU/Web Administration > Web Options.

Web options identifies global web options at a site level and many of these settings are re-used on the App. New App-specific settings are located in the Mobile App tab shown below.

Use web options for this site for mobile app: Open web options and check this box. Relius supports use of more than one web site so it's important to turn this option on for App so that the program knows where to pull global defaults. The App will not work properly until this is checked.

Participant web URL: Identify the URL of the participant web. This is used in notifications and messaging on the App to direct the participant to the web for certain functions not supported on the App. This must be a fully formatted URL beginning with https:// or http://.

Global Logo: Identify the logo shown within the App before the user selects a plan. The global logo is also shown once a plan is selected if no plan specific logo has been selected in the plan level setup for the App.

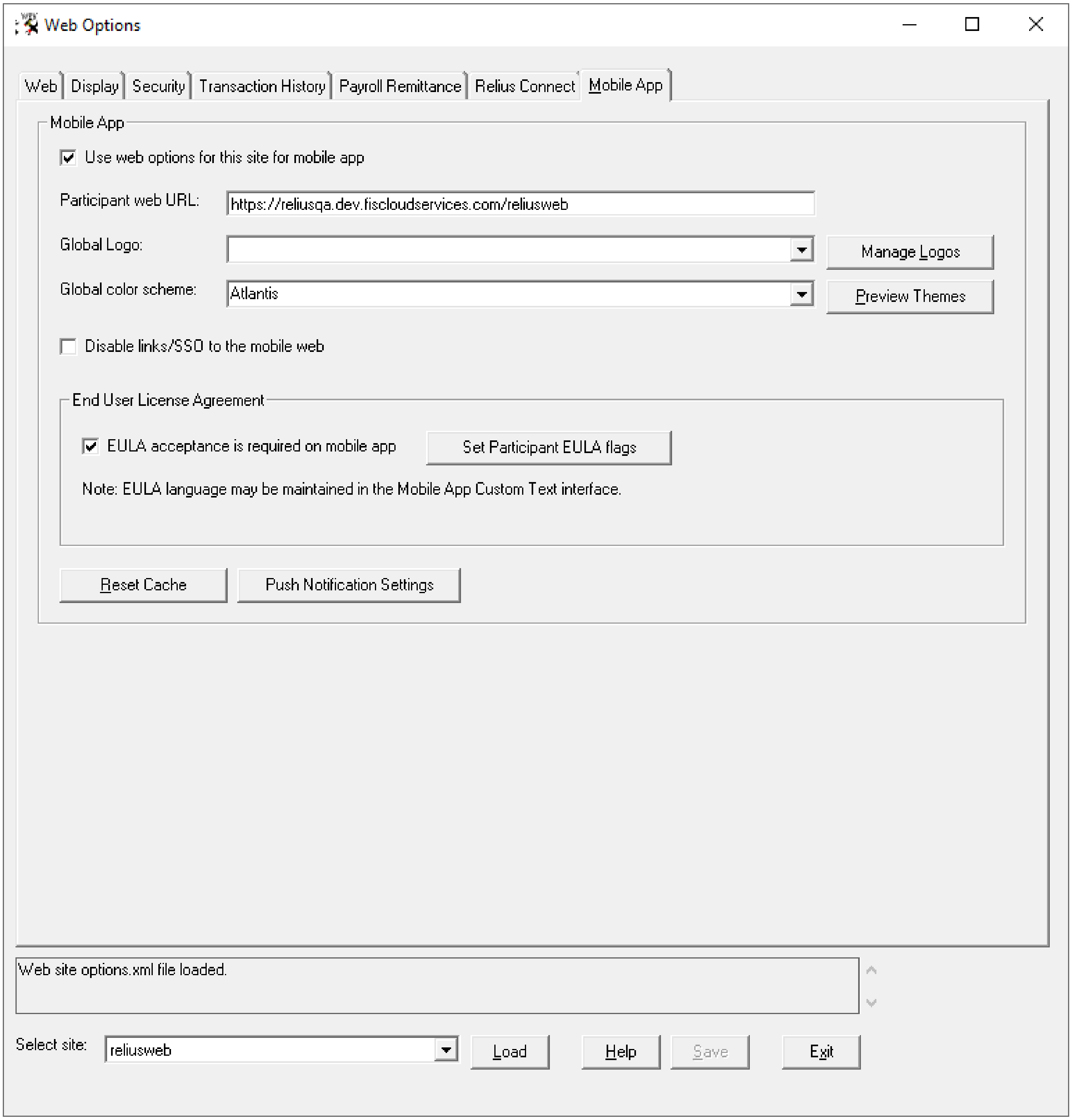
Global color scheme: Identify the default color scheme shown within the App befor the user selects a plan. The global color scheme is also used once a plan is selected unless a plan level color scheme override is specified in the plan level setup for the App

End User License Agreement (EULA):
When turned on, the EULA is a form that contains custom language that the user needs to read and accept before proceeding to the app. Relius has a participant level flag that tracks whether the participant needs to be shown the EULA (PERSON.AppEulaReqCd) and also the date on which the EULA is accepted (PERSON.AppEulaDate).

EULA acceptance is required on mobile app: To turn on EULA as a requirement, check this box and then click the Set Participant EULA flags. Setting flags will turn each participant's EULA flag on so that they will be required to agree to the EULA to access the App upon the next login. If the agreement changes and it is necessary to force people to agree again to the EULA, this can be achieved by clicking the "Set particiapant EULA flags" button in this form.

Disable links / SSO to the mobile web: Turning this option on will disable the logic to support single sign on to the participant web from the mobile app for enrollment, forced password changes and missing but required participant personal information. When SSO is disabled, particiants will still be prompted to login to the participant web to complete required processes but no button will be available to automatically access the web and single sign into the account.

Push Notification Settings: Click this button to access the web option settings necessary to support push notifications on the mobile app.



Once Azure Notification Hub and Firebase Cloud Messaging has been configured (see https://relius.net/MobileHelp/Topics/Index.Aspx?topic=PushNotification for detailed technical instructions), push notifications can be turned on for the App.

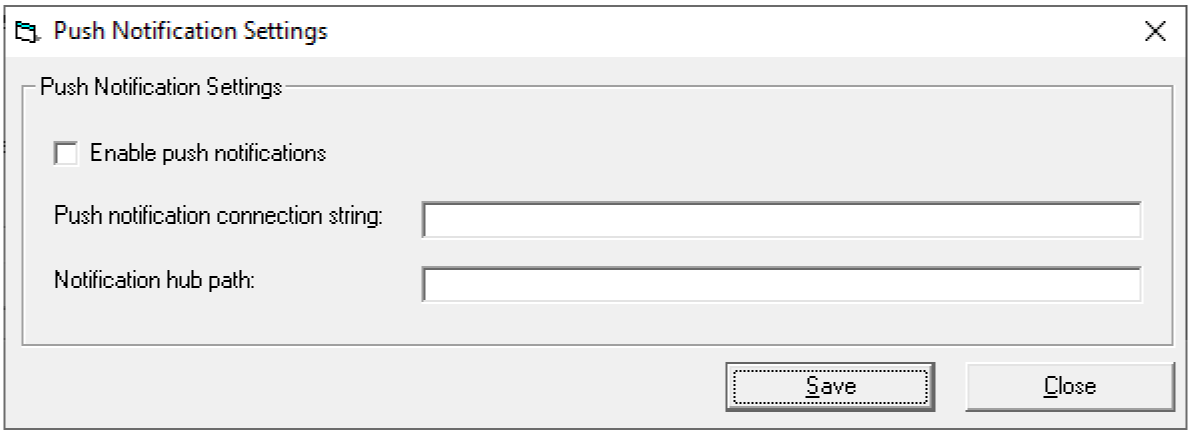
Enable push notifications: Check this box to turn on push notifications.

Push notification connection string: This is the DefaultFullSharedAccessSignature obtained from Azure

- How to get this value:
  - Sign into Azure Portal.
  - Selection All Resources
  - From the list, click Notification Hub
  - Under Manage> Select “Access Policies”
  - Copy the value of “DefaultFullSharedAccessSignature”

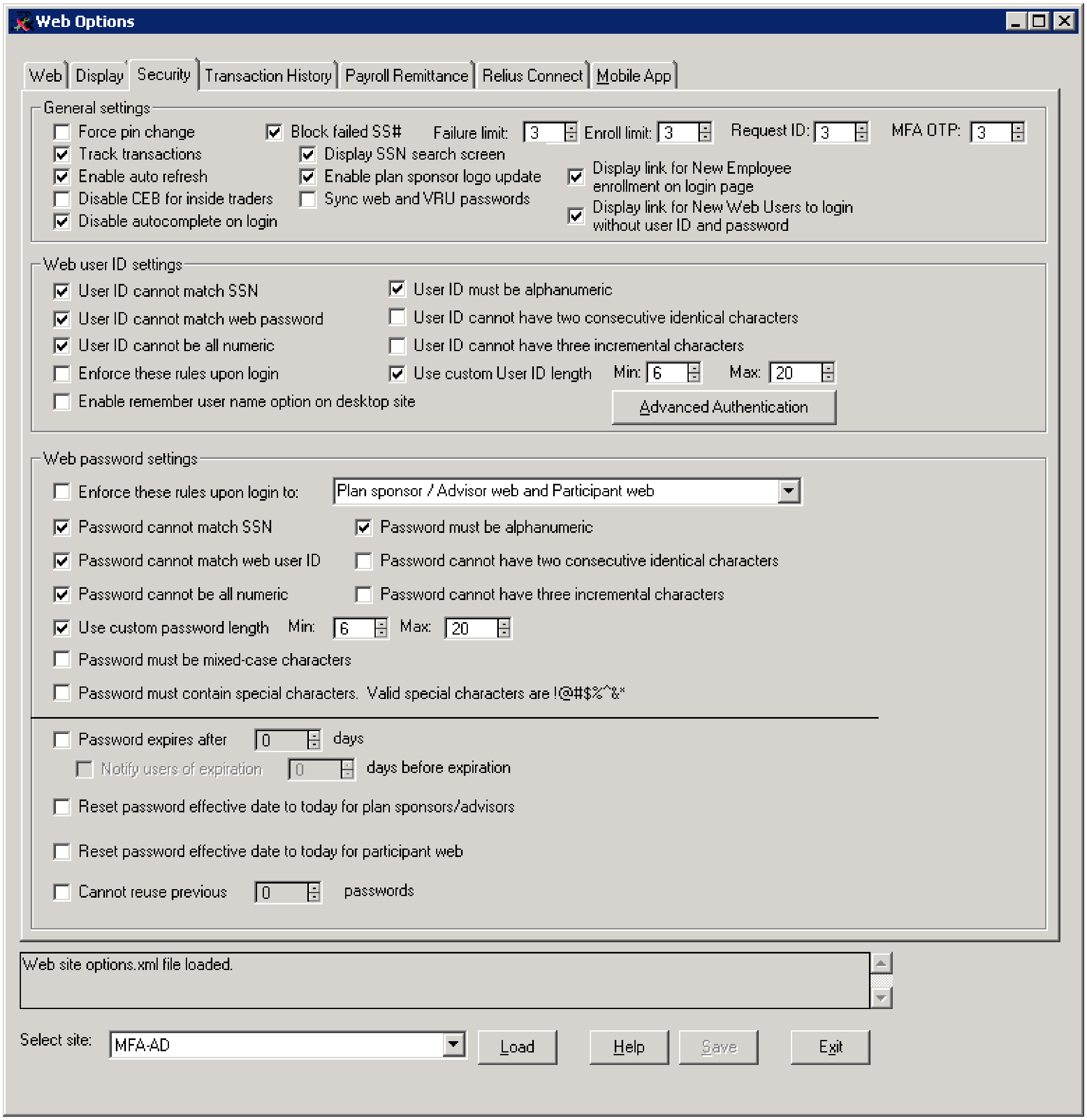
Notification hub path: This is the NAME field from the Azure Notification Hub

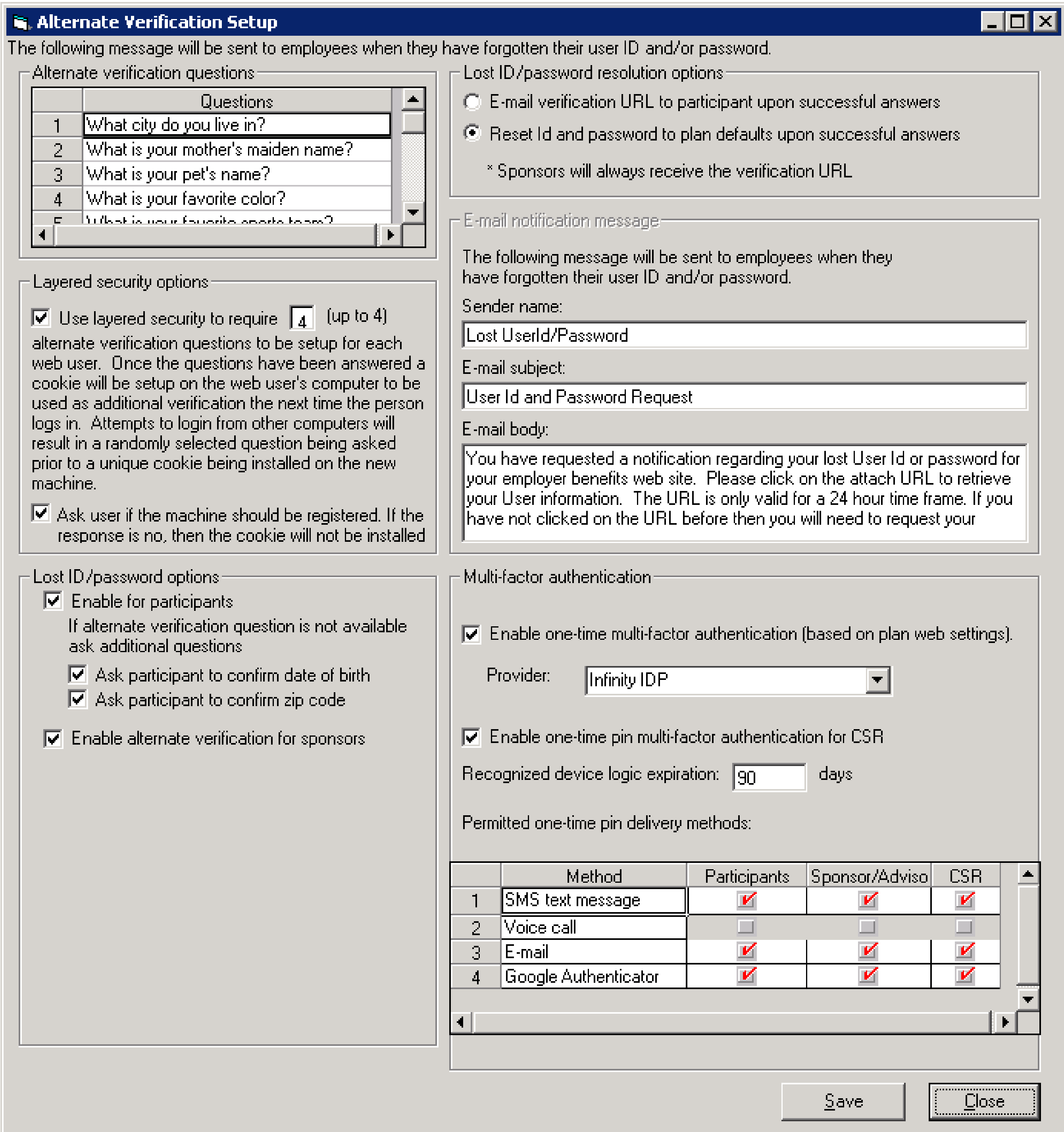
- How to get this value:
  - Sign into Azure Portal.
  - Selection All Resources
  - From the list, click Notification Hub
  - Under Settings> Select “Properties”
  - Copy the value of the NAME field



Security tab

The security options selected for web options in the Security tab of Web Options and in the Advanced Authentication form opened from within this tab will also pertain to the App:





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Relius Web Security Certificate

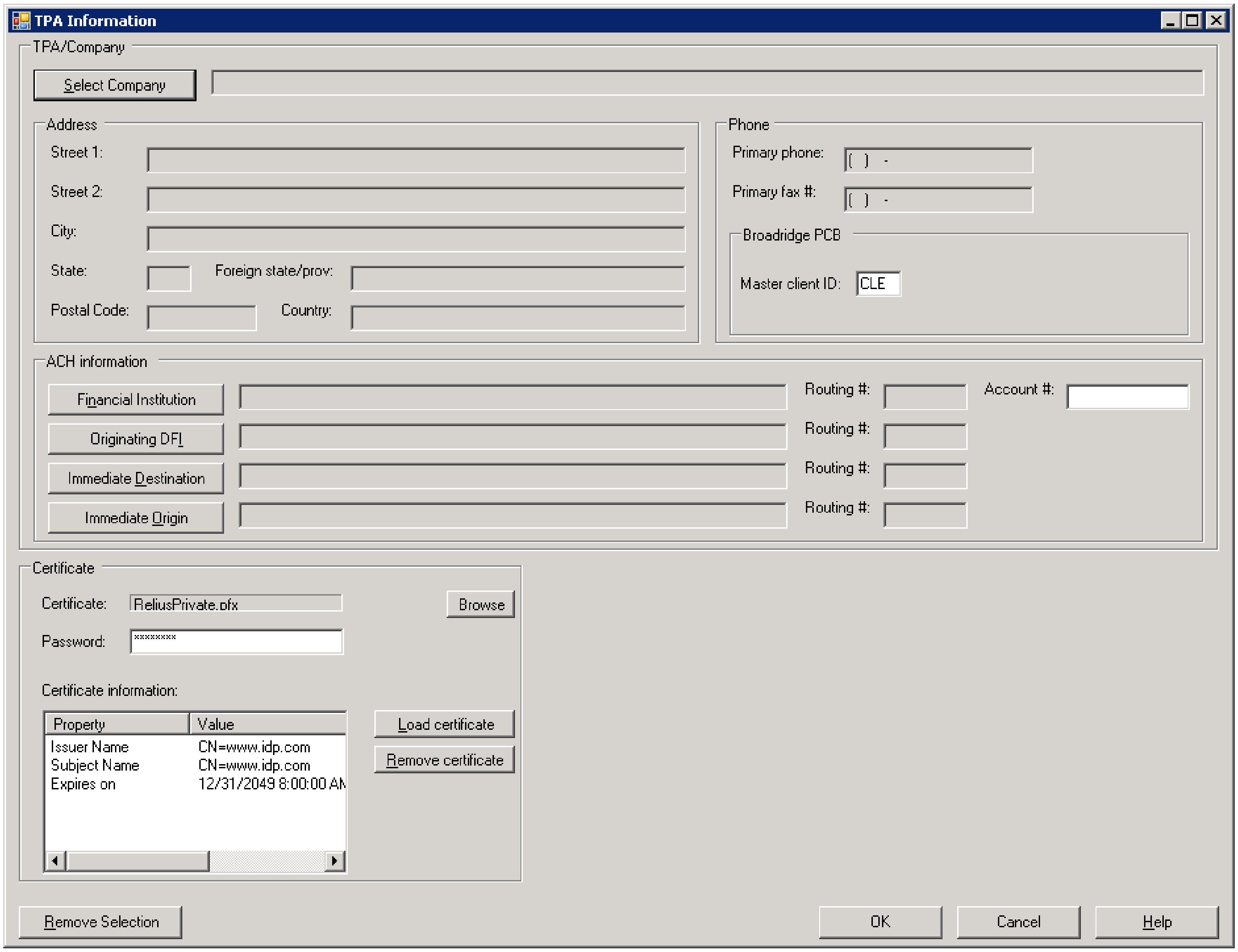
The Relius Web Security Certificate is used for security authentication processes including support for single-sign on. Some processes such as participant web enrollment, personal information changes, or password or username changes are not supported within the App. When the participant must access these non-supported processes, a message will show to the user explaining that the process must be completed in participant web. Relius Mobile App supports single sign-on (SSO) on transitions from App to participant web. With SSO, a participant is automatically authenticated onto the participant web rather than being required to enter the user name and password. In addition to specifying the URL of the participant web in the Global Web Options form, the web security certificate for Relius web must be stored in the Relius database as described below.

Note: Clients that are not using one-time PIN (OTP) for multi-factor authentication (MFA) or that are not using IdP as the provider for OTP MUST use the setup procedure below to support basic functionality in the App.

TPA Information – Relius Web Certificate

From the main Relius menu, access TPA Information by clicking on Utilities > System Administration > TPA Information.

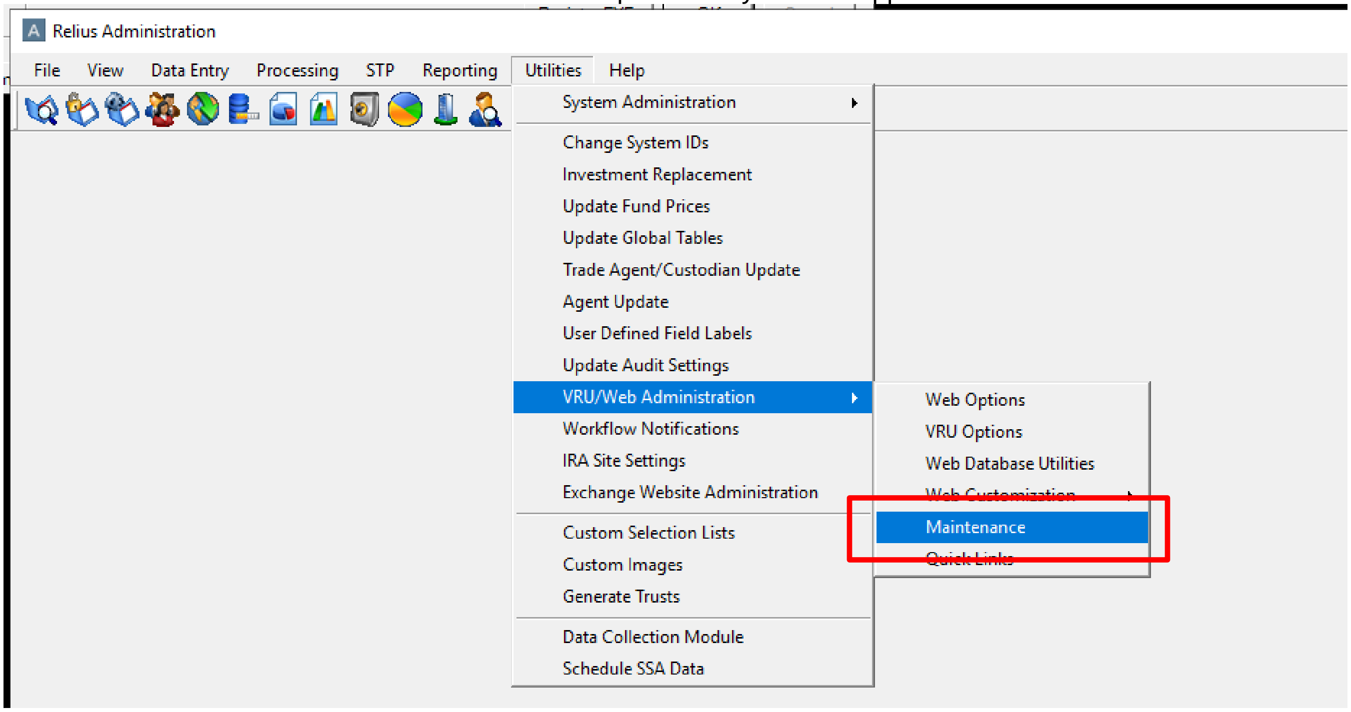
Within the Certificate frame in this form, select the Browse button to browse out to the private security certificate to upload it here. Go to https://relius.net/MobileHelp/Topics/Index.Aspx?topic=CertUtility for instructions to create a certificate which can be used for this process.

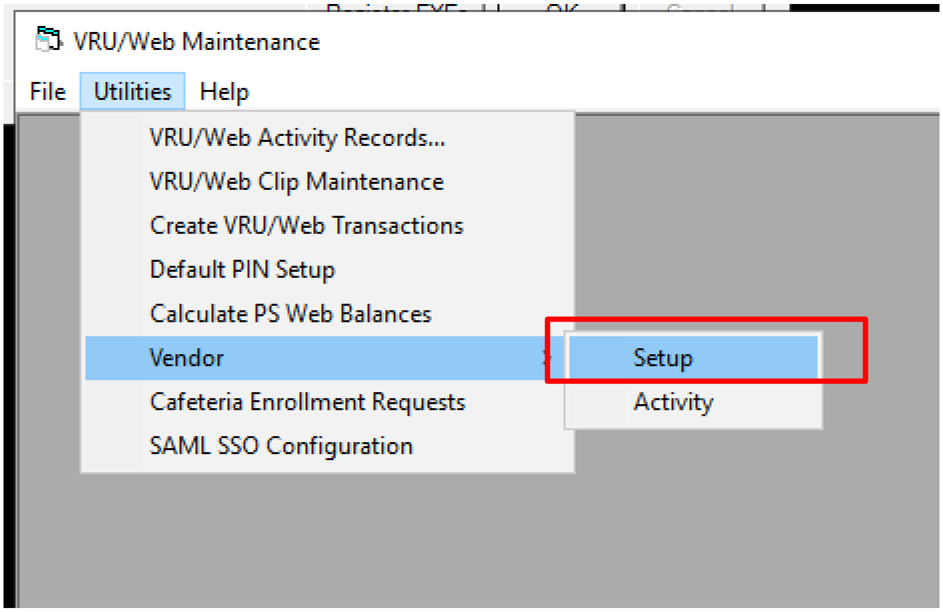

TPA Information
TPA/Company
Select Company
Address
Street 1:
Street 2:
City:
State:
Foreign state/prov:
Postal Code:
Country:
Phone
Primary phone:
Primary fax #:
Broadridge PCB
Master client ID:
CLE
ACH information
Financial Institution
Originating DFI
Immediate Destination
Immediate Origin
Routing #:
Account #:
Certificate
Certificate:
ReliusPrivate.pfx
Browse
Password:
Certificate information:
Property
Value
Issuer Name
CN=www.idp.com
Subject Name
CN=www.idp.com
Expires on
12/31/2049 8:00:00 AM
Load certificate
Remove certificate
Remove Selection
OK
Cancel
Help

MFA Certificate Required for IdP Delivery of the One Time PIN

Relius support will provide clients the required certificate needed for systems that use IdP for one-time PINs on the mobile app. This certificate will need to be uploaded within Relius as follows:

From the main menu, select Utilities > VRU/Web Administration > Maintenance. From the VRU/Web Maintenance form, select Utilities>Setup. From the Vendor Setup form, double click on the Infinity IdP record. Click the Certificate button to load the certificate file provided by Relius support.





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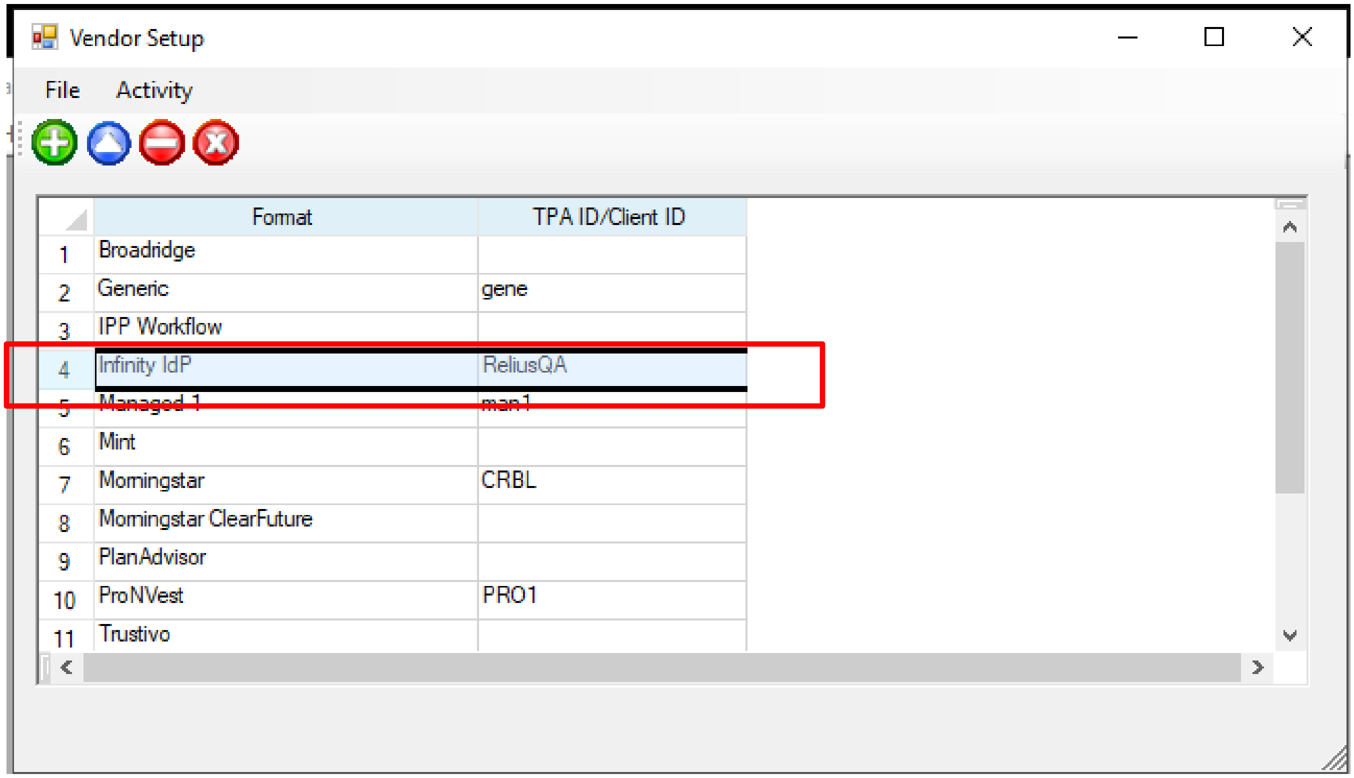
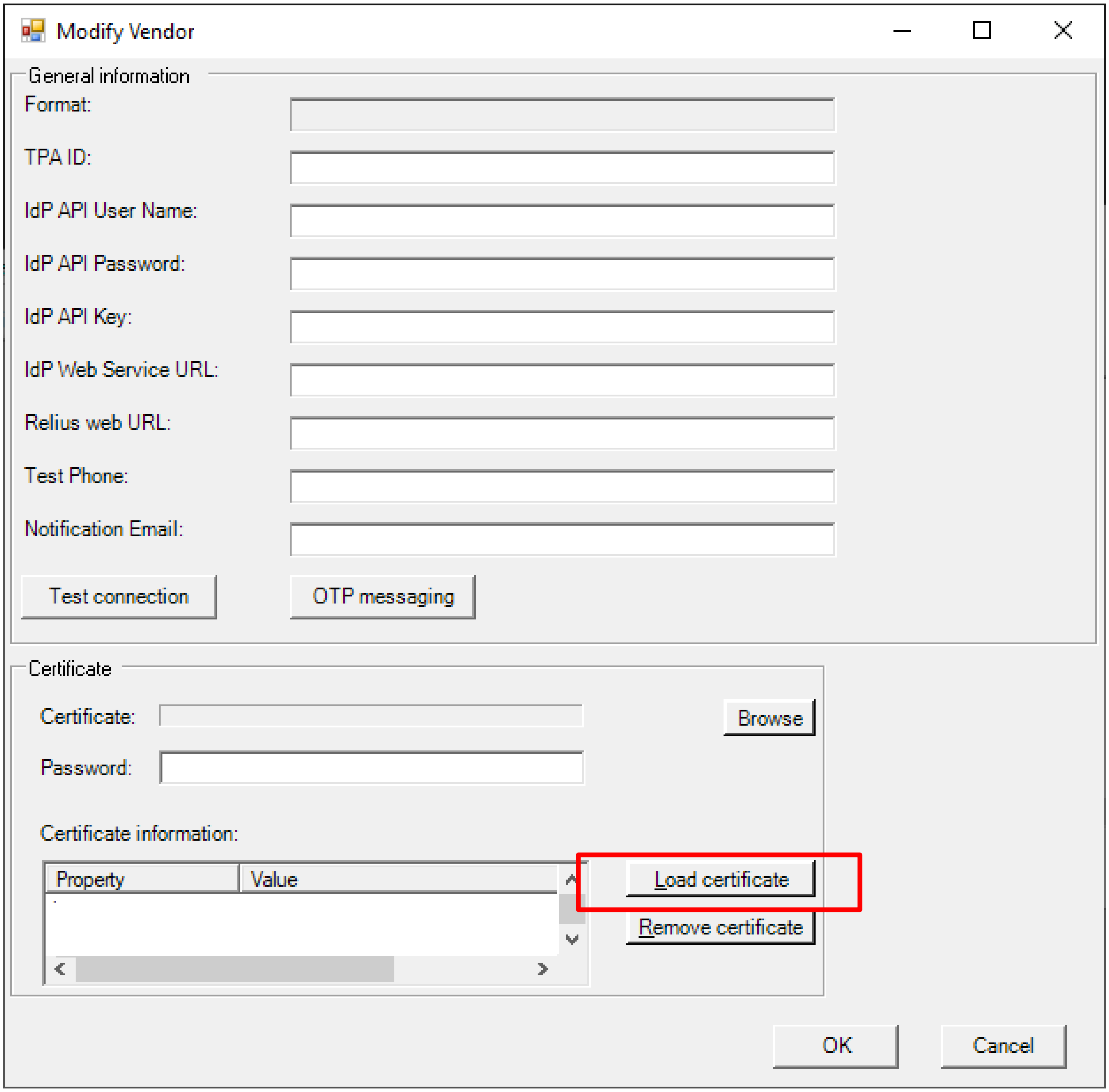
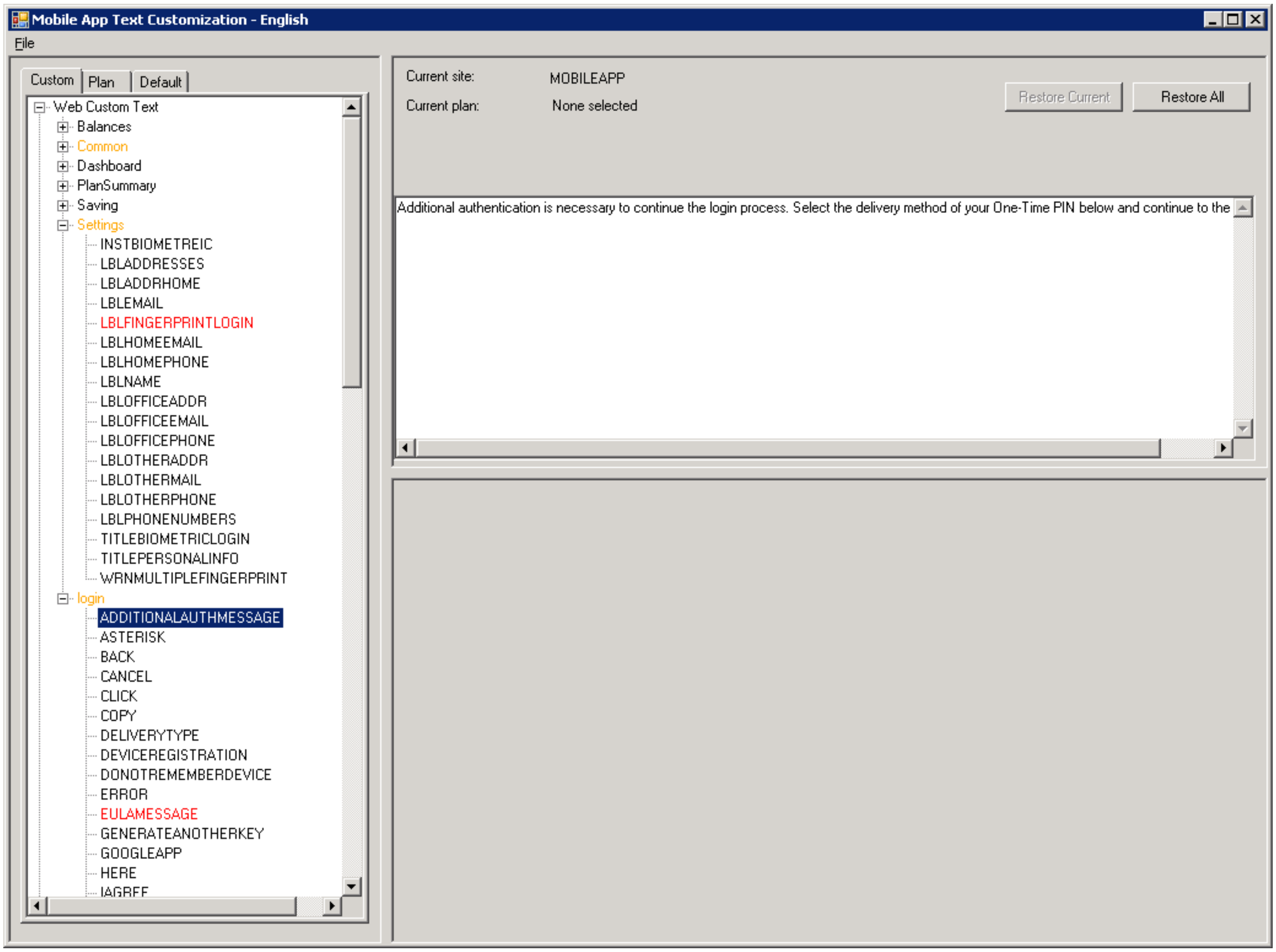

Vendor Setup
File
Activity
Format
TPA ID/Client ID
1 Broadridge
2 Generic gene
3 IPP Workflow
4 Infinity IdP ReliusQA
5 Managed 1 man1
6 Mint
7 Morningstar CRBL
8 Morningstar ClearFuture
9 PlanAdvisor
10 ProNVest PRO1
11 Trustivo


Modify Vendor
General information
Format:
TPA ID:
IdP API User Name:
IdP API Password:
IdP API Key:
IdP Web Service URL:
Relius web URL:
Test Phone:
Notification Email:
Test connection
OTP messaging
Certificate
Certificate:
Browse
Password:
Certificate information:
Property
Value
Load certificate
Remove certificate
OK
Cancel

Mobile App Custom Text

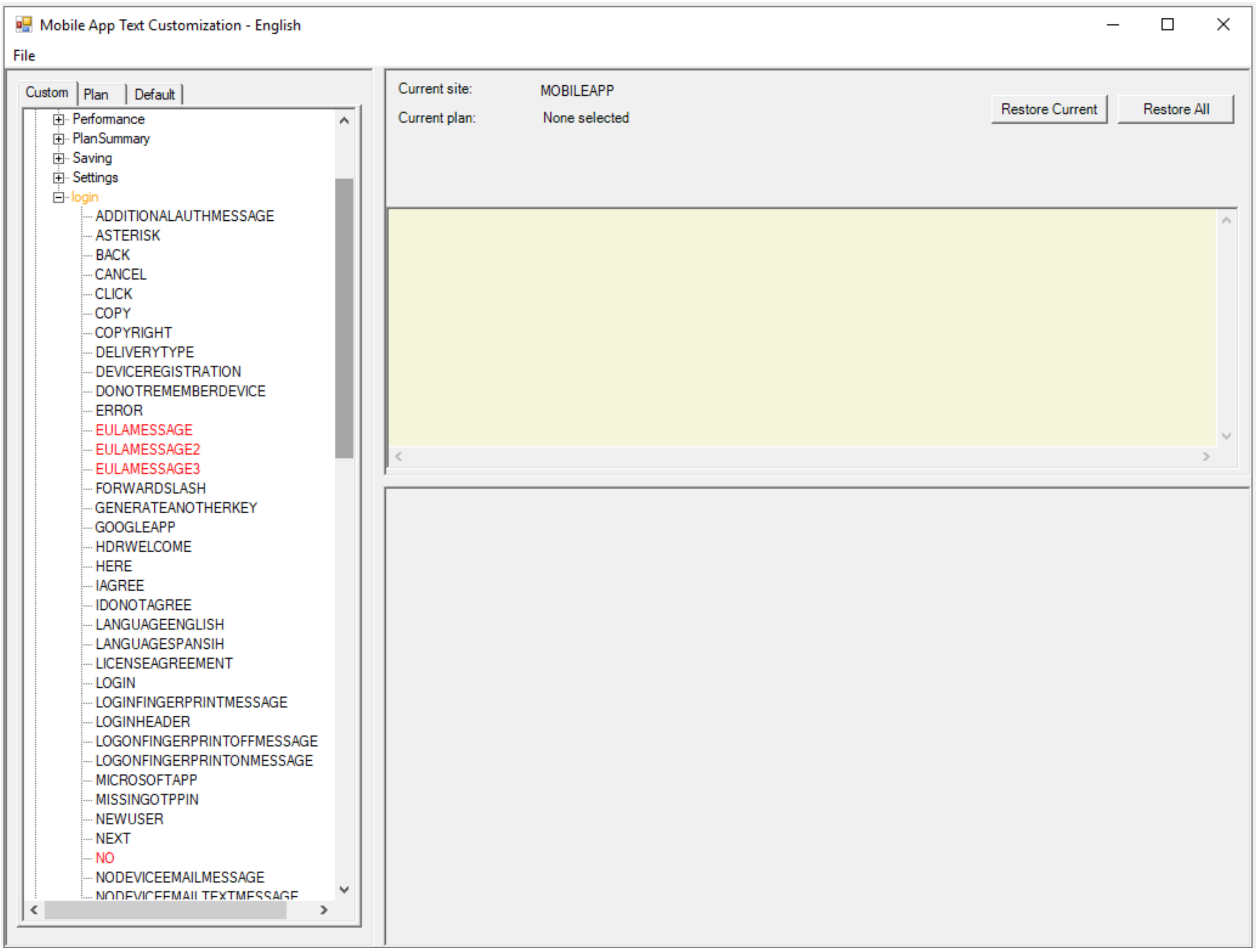
The Mobile App Custom Text interface can be opened from the main Relius menu by selecting Utilities > VRU/Web Administration > Web Customization > Mobile App Text.

This form works the same as the corresponding interface for custom text on participant web. Almost every text element used on the App can be customized from within this interface.



End User License Agreement (EULA)

Of interest with App custom text is the EULA custom text. If you wish to require participants to agree to your EULA, the custom text for this form can be established using the custom text elements under the login node named EULAMESSAGE, EULAMESSAGE2, EULAMESSAGE3. Each of these custom text elements can contain up to 4000 characters. If your EULA is between 4000 and 8000 characters, include up to 4000 characters in EULAMESSAGE and the remainder in EULAMESSAGE2. Using the sample EULA in Appendix B as an example, this requirement can be met by placing items 7 and 8 of that content into EULAMESSAGE2. If your EULA is between 8000 and 1200 characters, use EULAMESSAGE3 for characters in excess of 8000. These contents of these custom text elements are seamlessly concatenated together on the App.

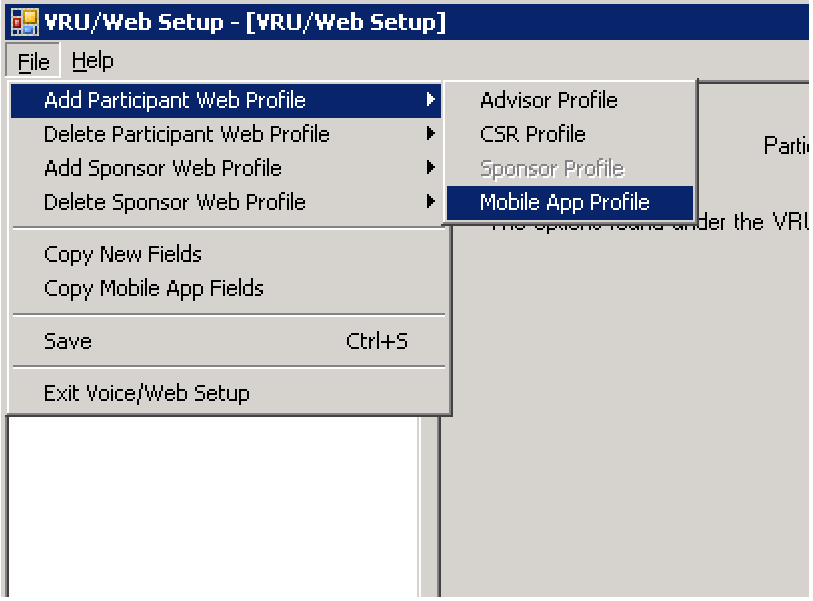


Plan Level Web Settings

From the main Relius menu, select Data Entry > VRU/Web Setup

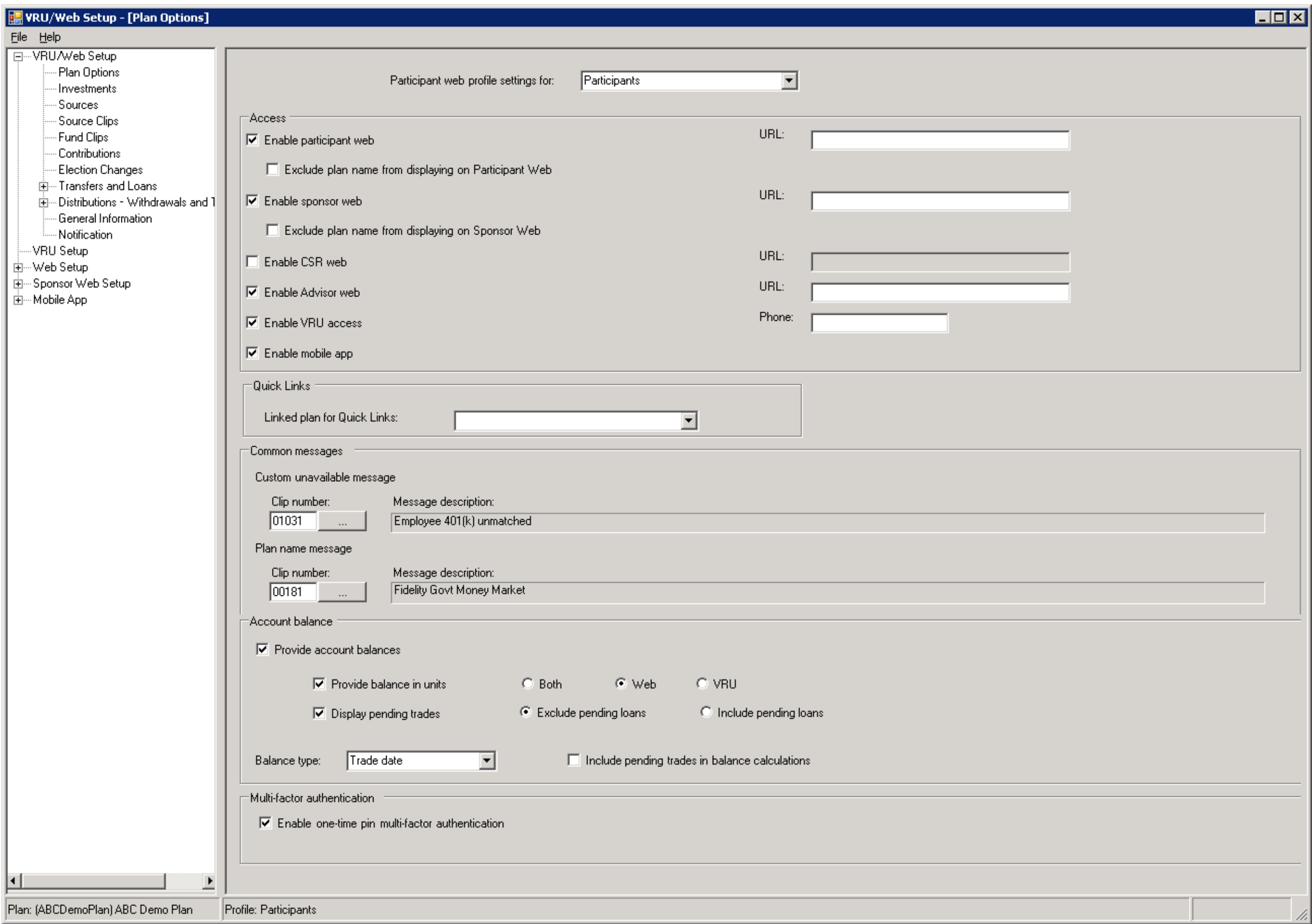
Mobile App Profile

Many of the existing plan level web settings that apply to participant web are also applicable to the App. Unless it is desired to use different selections for these settings between participant web and App, there is no need to create the Mobile App profile. In the absence of a Mobile App profile, settings relevant to the App will be retrieved from the participant web profile. However, it is possible to assign different settings for these fields by creating a dedicated Mobile App profile. To do this, from within the VRU/Web Setup interface, select File > Add Participant Web Profile > Mobile App Profile. Thereafter, select “Mobile App” in the “Participant web profile settings” drop down box at the top of the VRU/Web Setup forms to specify settings to be used in the Mobile App.



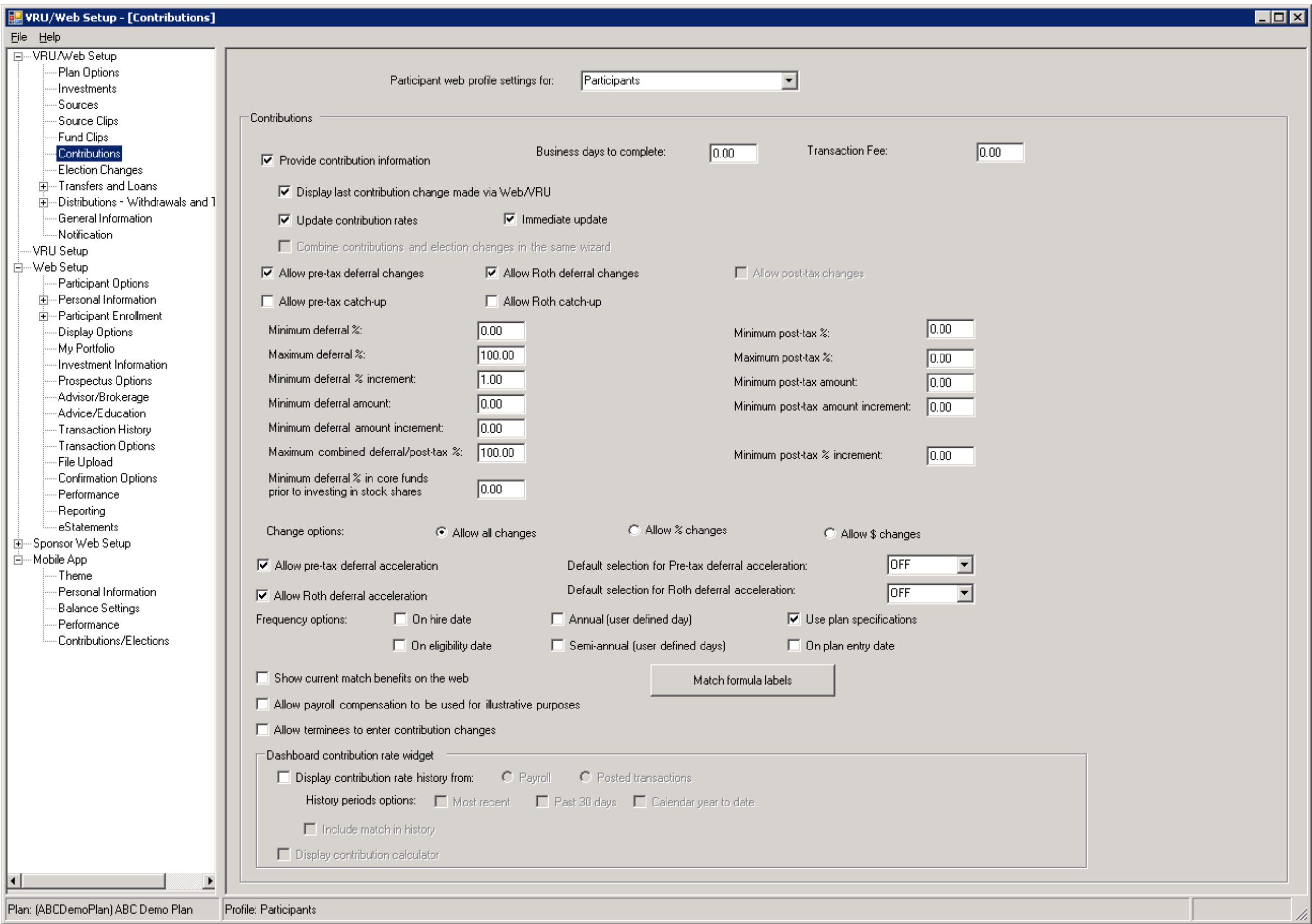
Plan Options

Settings in this form are always selected using the Participant profile as shown here. To turn on the App functionality for a plan, check the “Enable mobile app” checkbox on this form.



Contributions

This form is used to determine rules applicable to participant web for contributions. The “Provide contribution information” checkbox must be turned on in this form before contributions will be visible in the App.



Mobile App forms

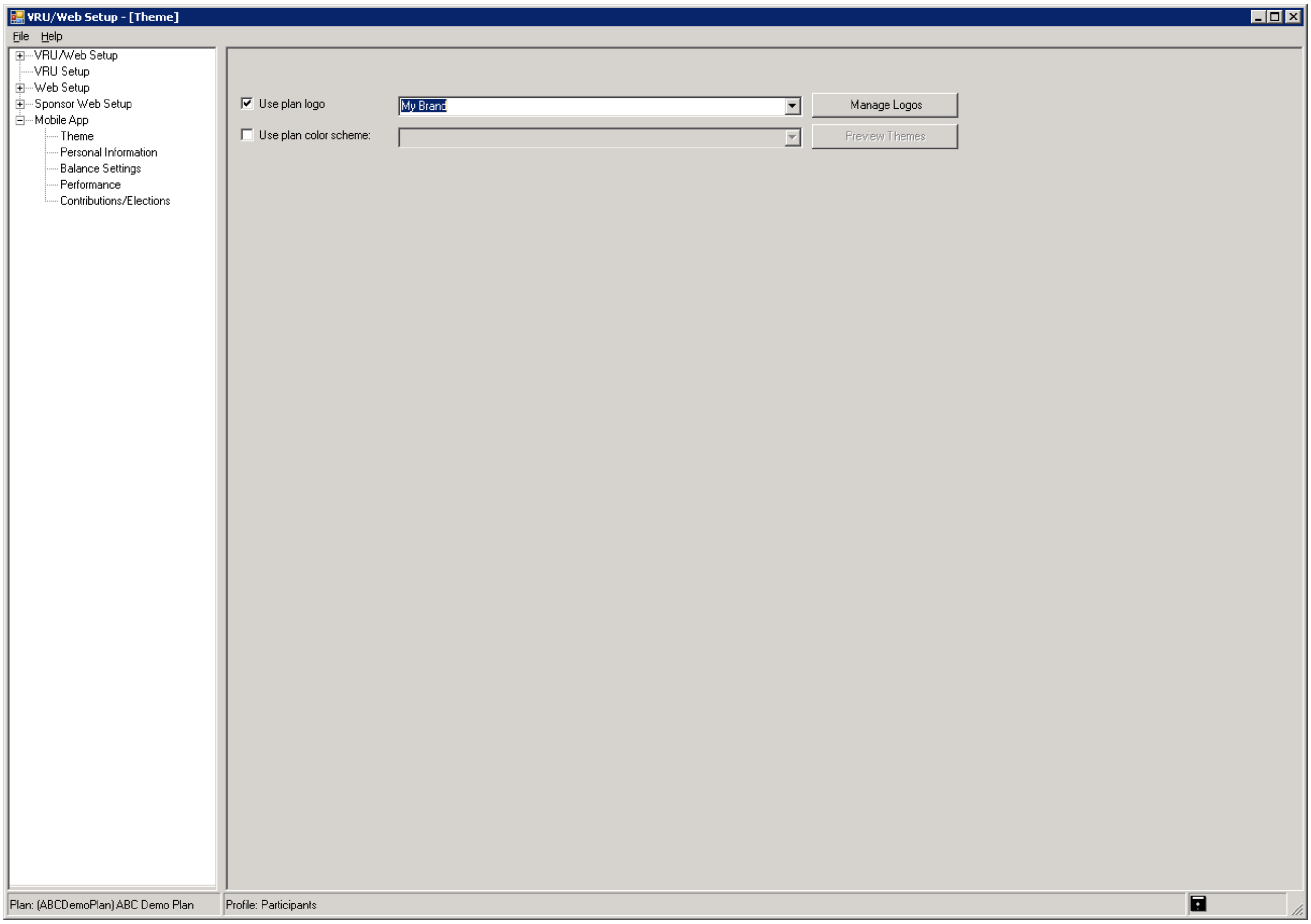
A new “Mobile App” node is available in the tree view control on the left of the VRU/Web Settings interface. Settings in the forms under this node are applicable only to Mobile App.

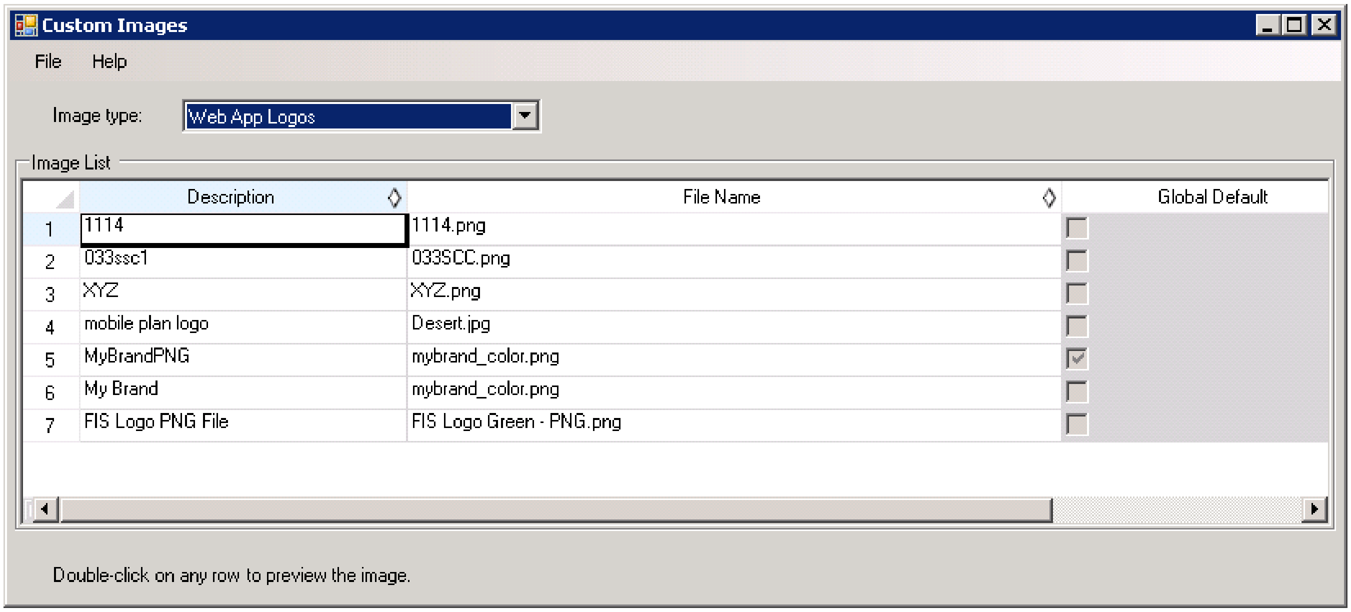
Mobile App Theme

The Mobile App form allows for plan specific selections about the appearance of the App.

Use plan logo: To use a plan specific logo that is visible once the plan is selected from within the App, check the “Use plan logo” checkbox and select a logo from the drop down to select from App logos that have been previously added in the Custom Images interface. When this option is not checked, the global logo identified in Web Options will be used. To access the available logos, select the Manage Logos button.

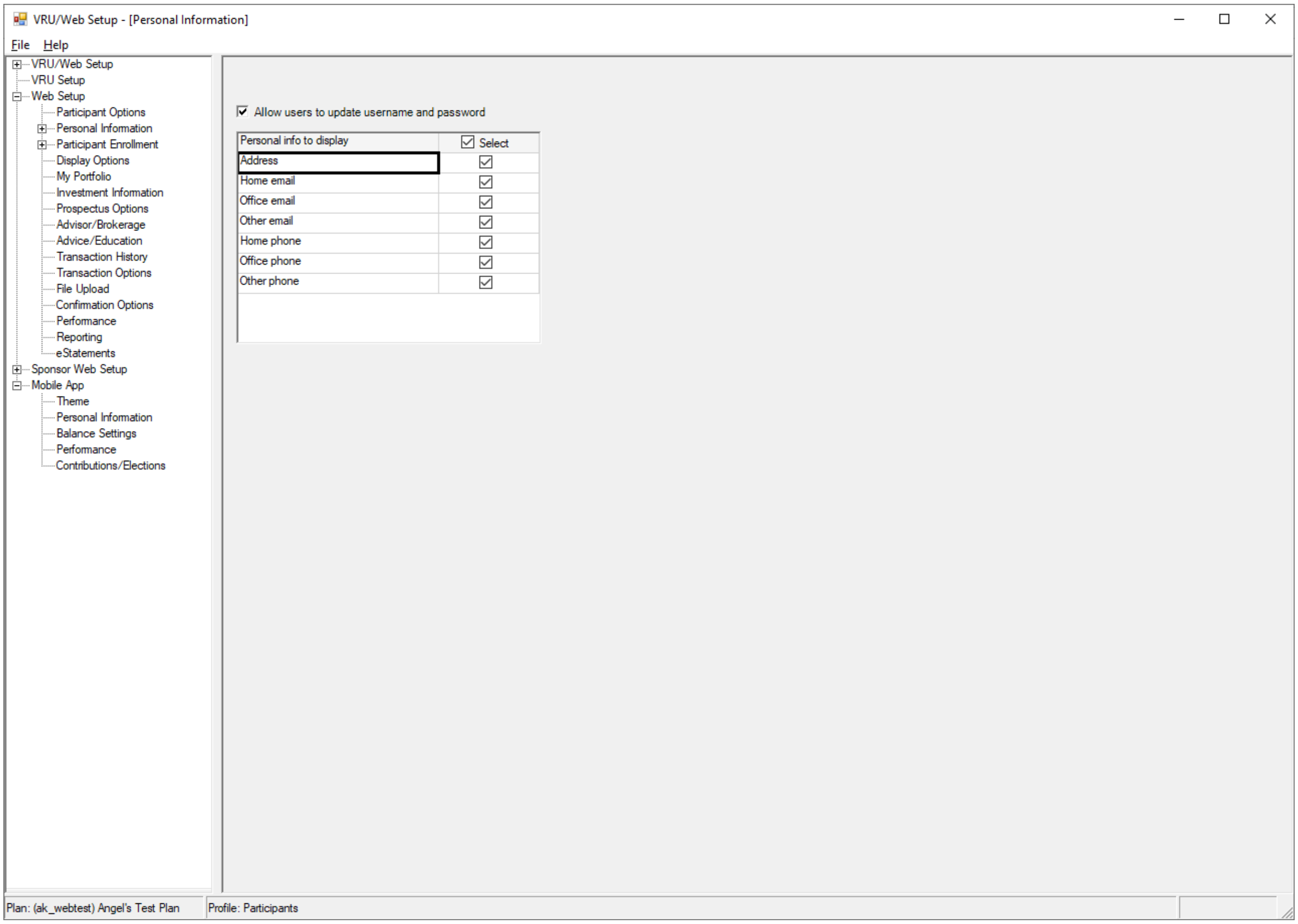
Use plan color scheme: To use a plan specific color theme that is visible once the plan is selected from within the App, check the “Use plan color scheme” checkbox and select a color scheme from the associated dropdown box. When this option is not checked, the global color scheme identified in Web Options will be used. To see examples of the color schemes, select the Preview Themes button.




Custom Images
File
Help
Image type:
Web App Logos
Image List
Description
File Name
Global Default
1 1114 1114.png
2 033ssc1 033SCC.png
3 XYZ XYZ.png
4 mobile plan logo Desert.jpg
5 MyBrandPNG mybrand_color.png
6 My Brand mybrand_color.png
7 FIS Logo PNG File FIS Logo Green - PNG.png
Double-click on any row to preview the image.

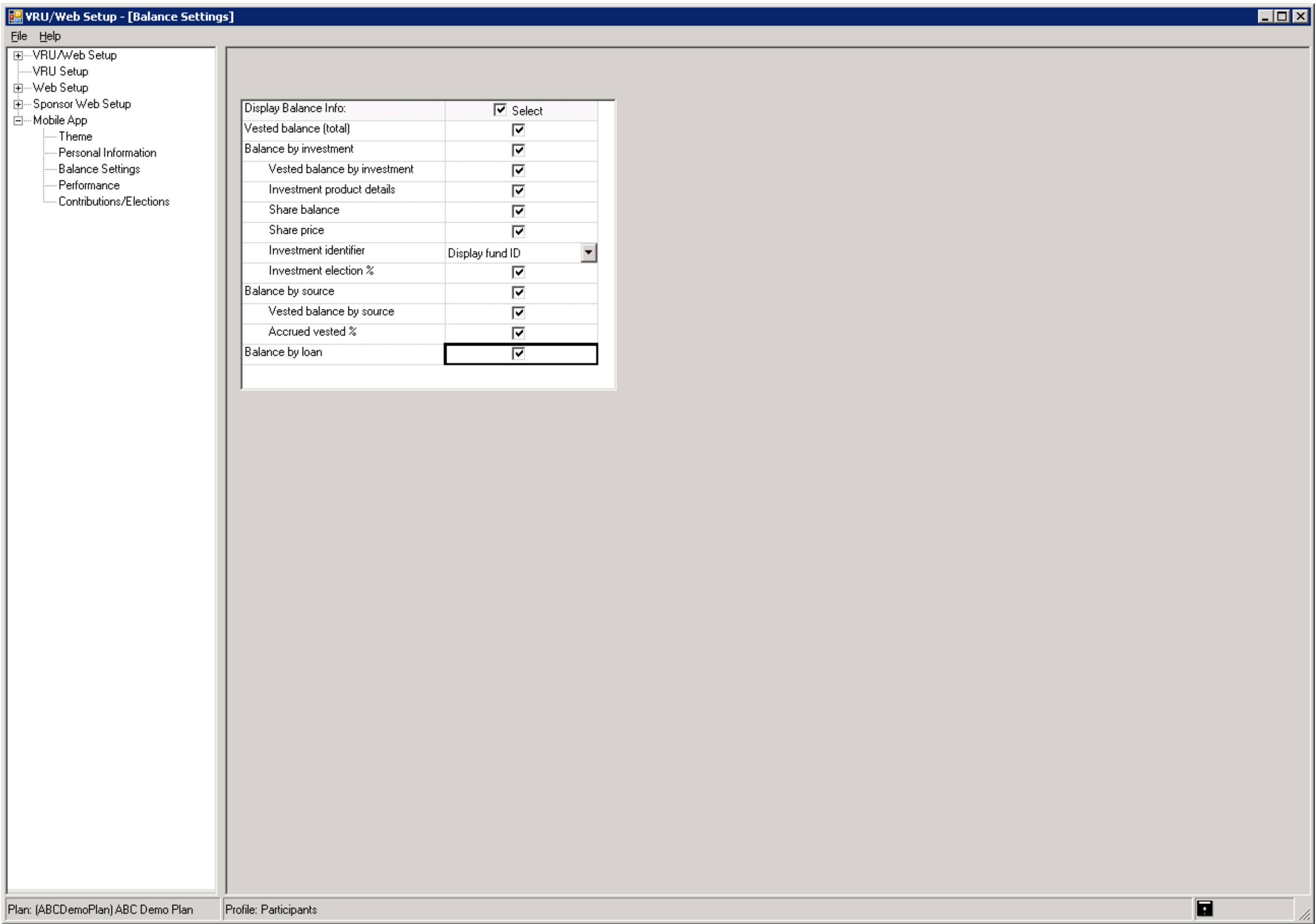
Mobile App Personal Information

Select the personal information that should be visible in the App. All personal information on the App is currently view-only. The mobile app supports the ability to update username and password when the option on this form is turned on.



Mobile App Balance Settings

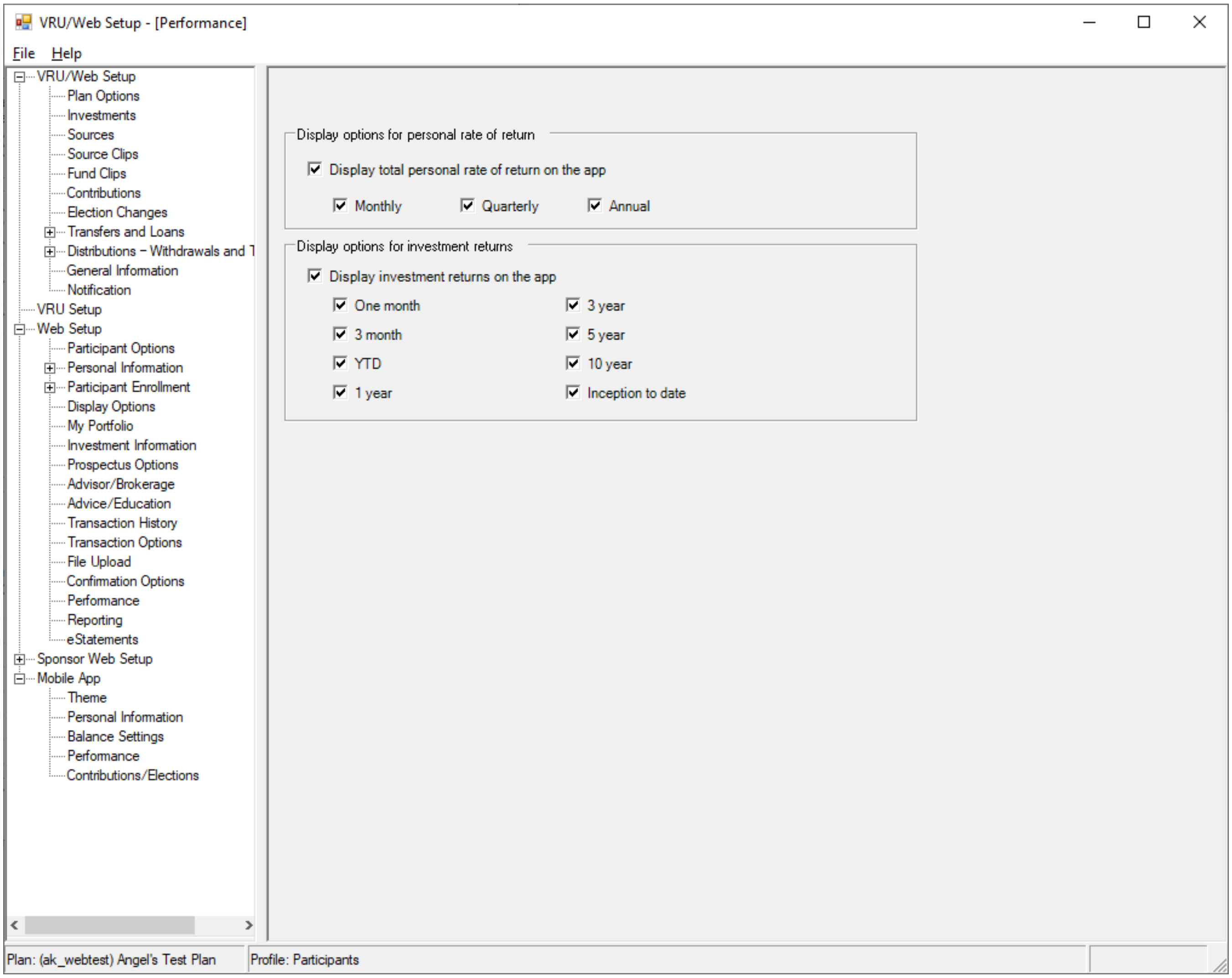
Select the settings to be used for balances on the App.



Mobile App Performance Settings

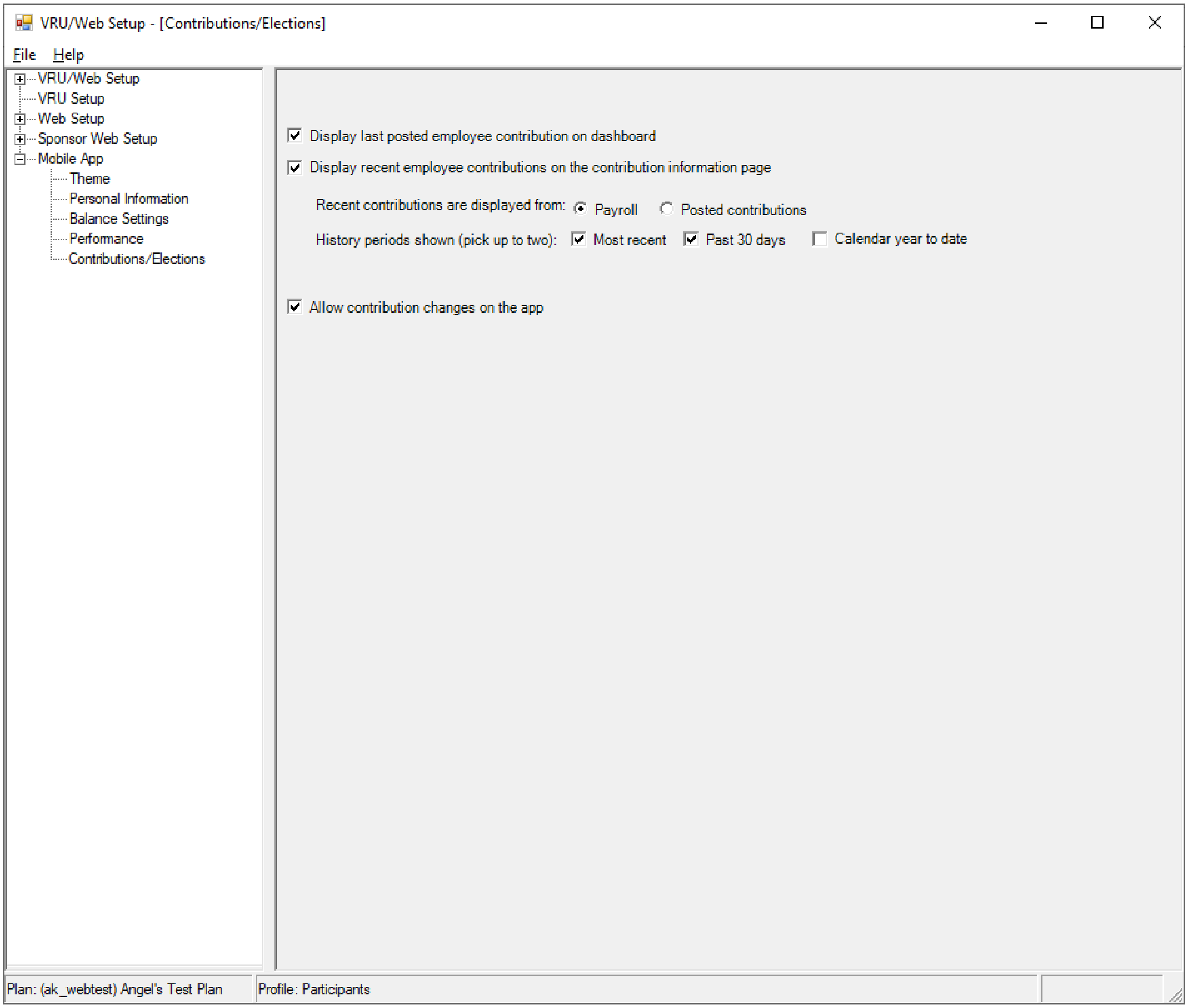
Select the personal rate of return settings to display on the App and the investment return options to display on the App.

Note: investment returns will not be available for *investment products* until Relius version 2020.



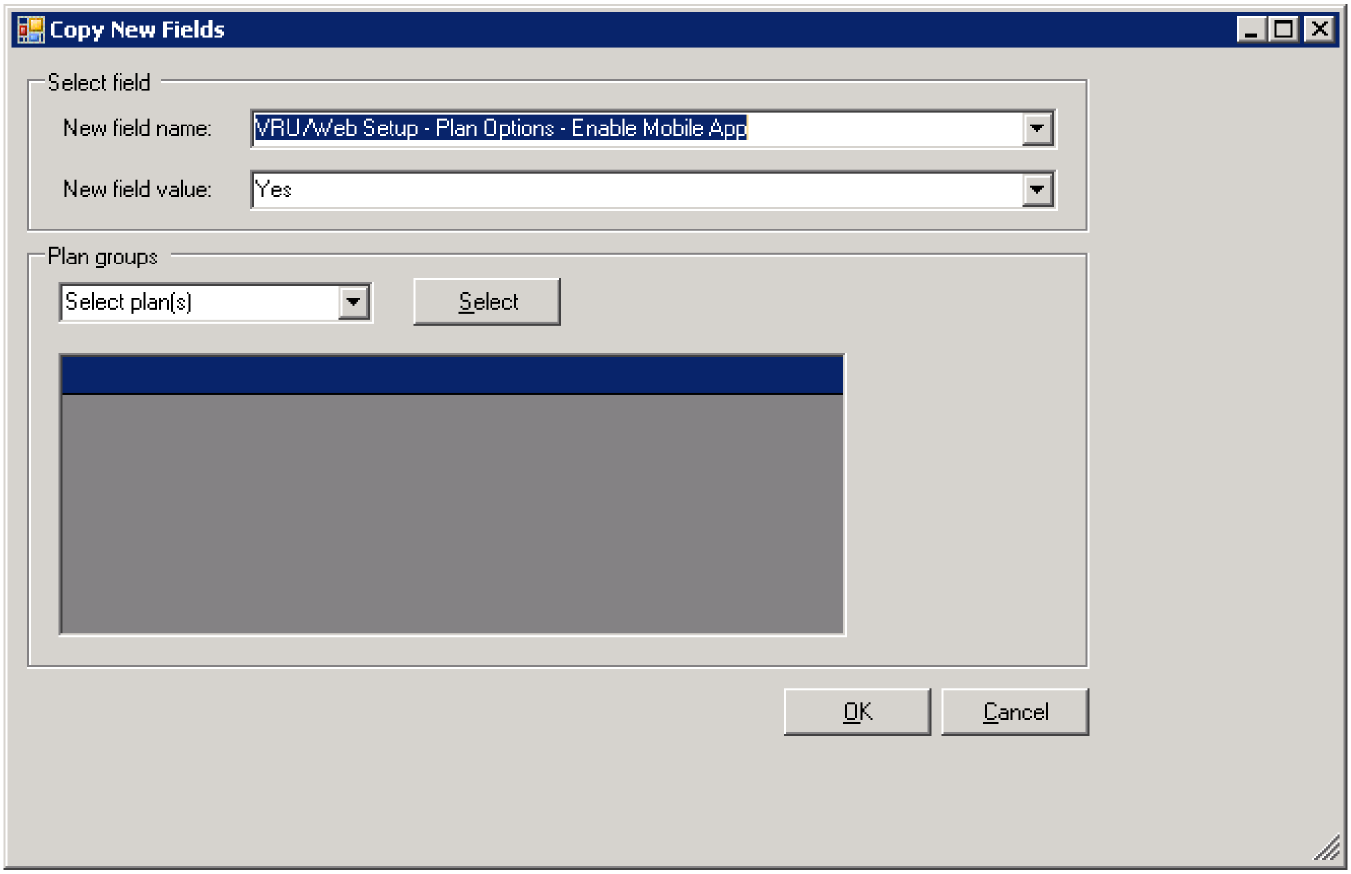
Mobile App Contributions/Elections

App specific options related to contributions are shown on this form. Note that "Allow contribution changes on the app" must be selected for contribution rate changes – this option is intended to easily allow contributions to be turned off in the App but still be turned on in Participant Web. However, shared settings in the VRU/Web >Contributions must be setup properly as these settings are still are used to determine the type of contribution changes allowable.



Copy Options for Shared Settings Between Participant Web and Mobile App

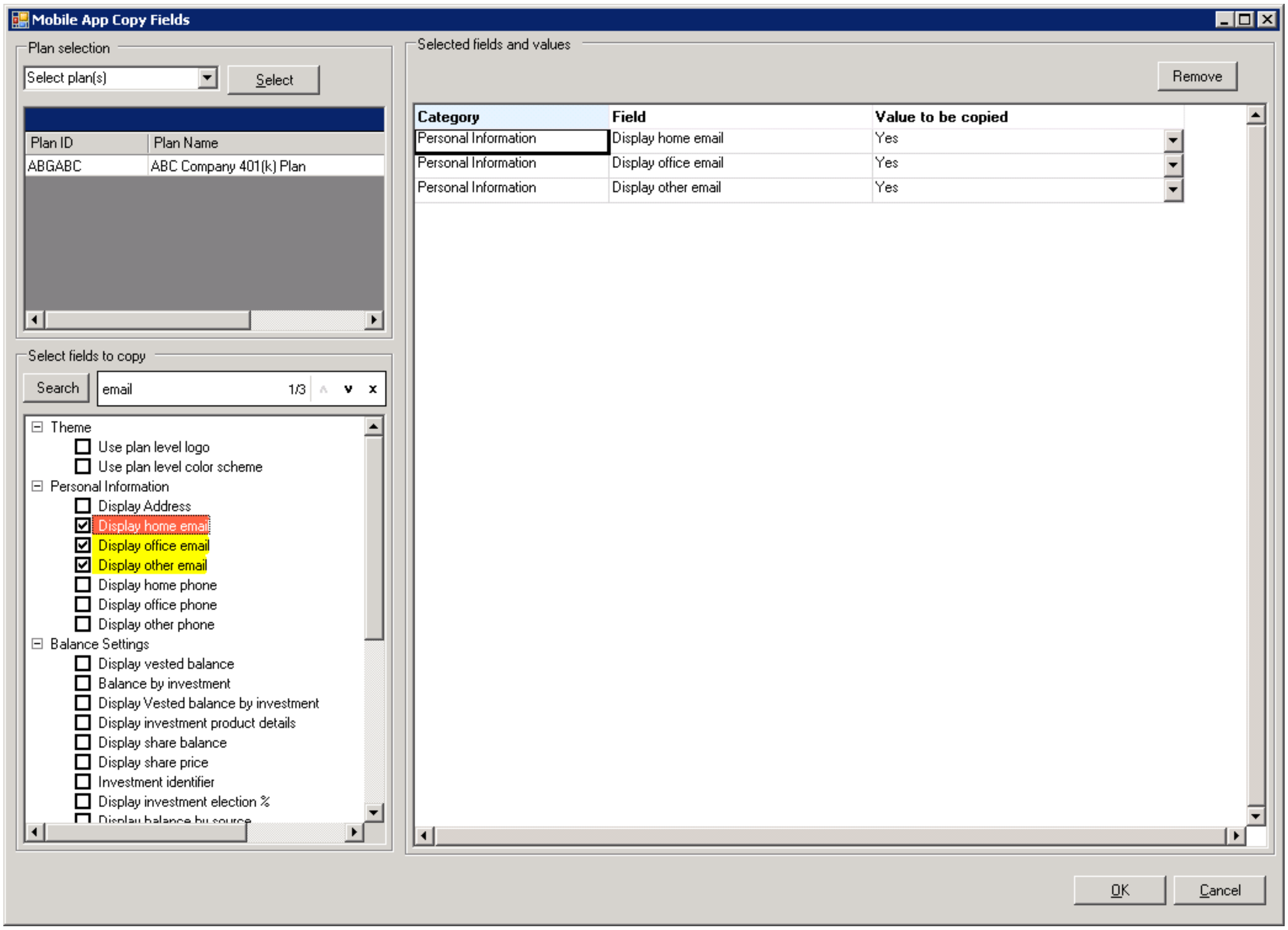
To copy settings other than the Mobile App specific settings, select File > Copy New Fields and select the field to copy. To turn on the App for multiple plans, use this feature to select “VRU/Web Setup – Plan Options – Enable Mobile App” to copy to other plans.



Copy Options for Mobile App Specific Settings

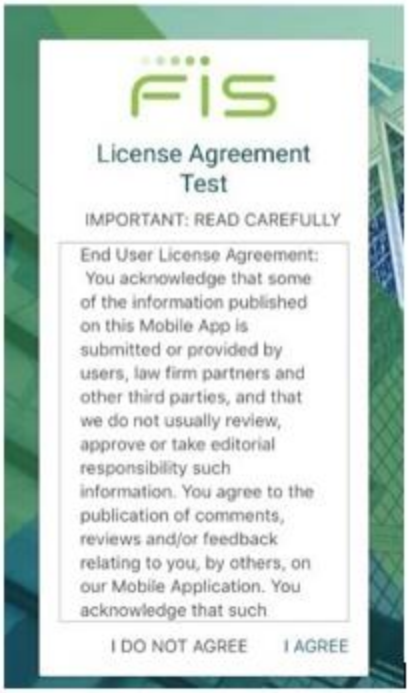
Settings under the new Mobile App node can be copied using a new interface available from File > Copy Mobile App Fields.

This new interface allows you to search for and select any App setting, determine the plans to which to copy the settings, and view and modify the selected value for the setting (simple settings only) to be copied. Values for settings that require advanced selection interactions (e.g., selecting a logo) can only be copied by copying the value in the current plan to the destination plans. Other simple settings allow for the value to be modified directly from within this form.



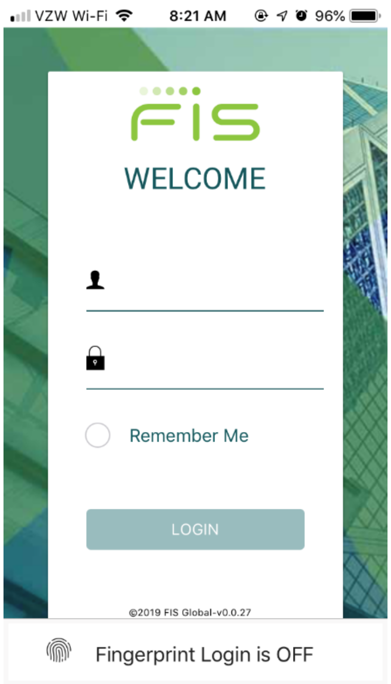
Mobile App Forms - End User License Agreement (EULA)

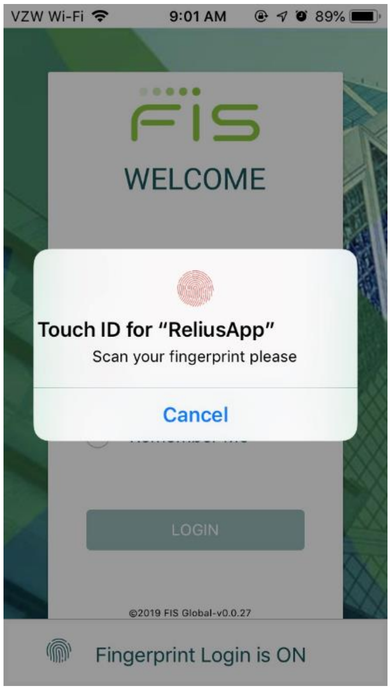
If turned on for the App and if the participant is flagged to require this, the participant will see the EULA form. This language is fully customizable. The user must select I AGREE to proceed into the App. This will turn the EULA flag off so that the participant will not see the EULA form the next time they log in. However, the flag that is used to show this form can be turned on for everyone from within Web Options.



Mobile App Forms - Login

Biometric Authentication



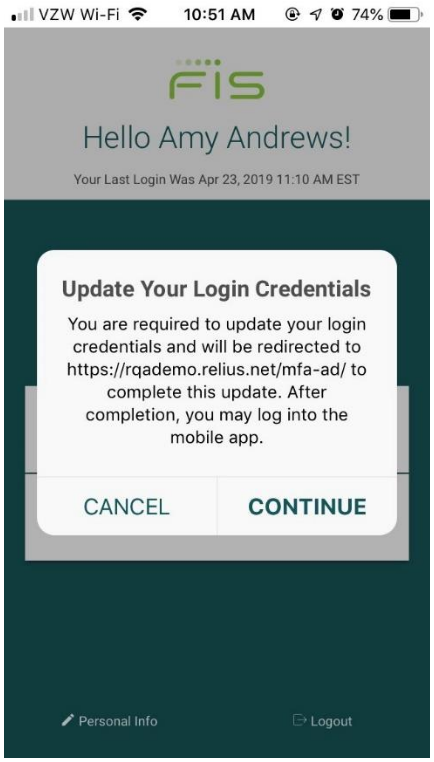


Biometric Authentication

Biometric authentication during sign-on (e.g., fingerprint usage) can be turned on at the participant level and used to bypass providing username and password on the login screen. This option requires the user first login using the username and password to turn on this feature.

NOTE: Biometric authentication uses the technology native to the mobile device. Anyone who has been granted biometric access on your mobile device will be able to utilize their biometric reference for access to the Relius Mobile App.

Forced Password Changes

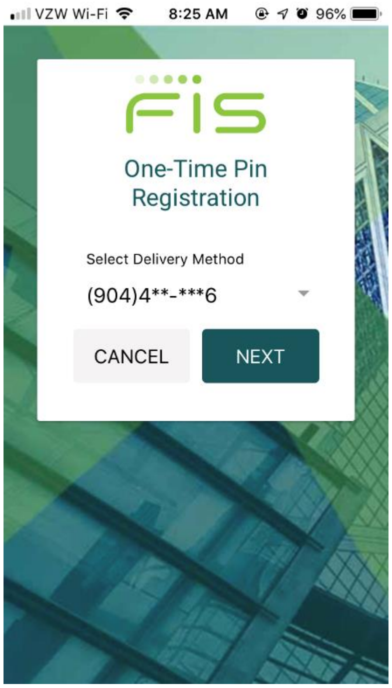


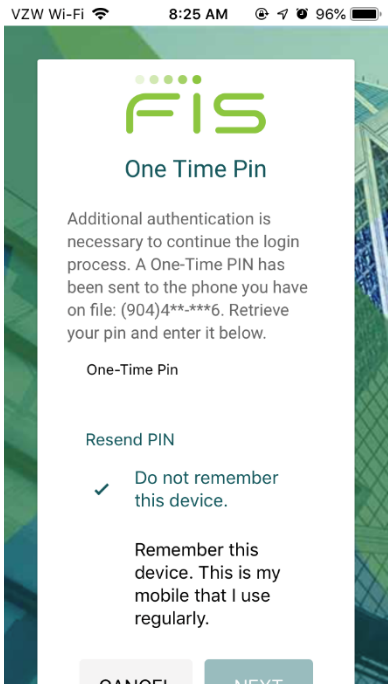
Forced Password Changes

If the rules applicable to username and password require that the user change their username or password upon login and the VRU/Web Mobile App option to allow the user to change the username and password on the web are turned on, then the user will be directed to change the login credentials in app. Otherwise, the user will be redirected to the participant web to complete this step prior to accessing the plan on the App. When redirecting the participant to the web, if single sign-on is setup per this guide (see page 15), the participant will be automatically signed in to the participant web.

Multi-factor Authentication: One-time PIN

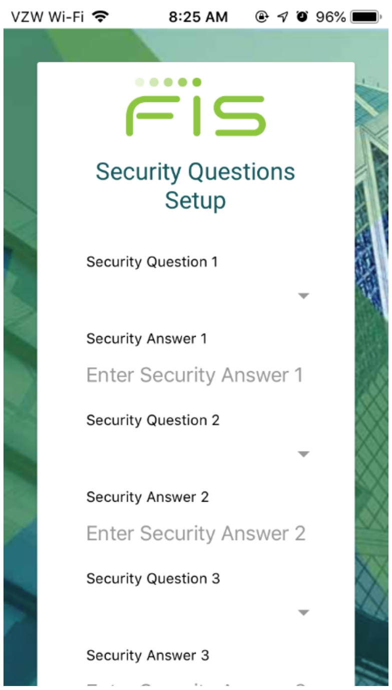
The same one-time PIN rules that are set up for the plan are also applicable to access using the App.

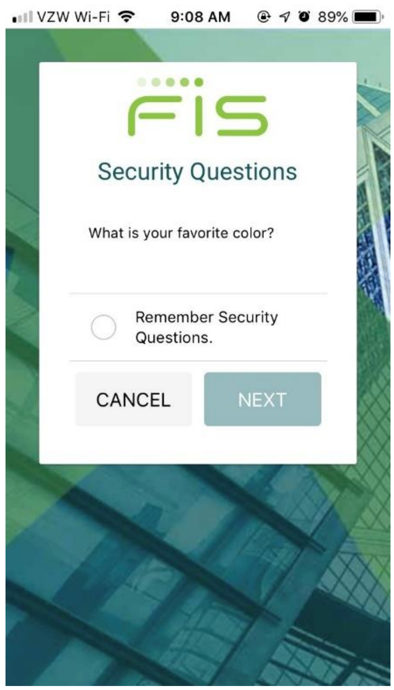




Multi-factor Authentication: Security Questions

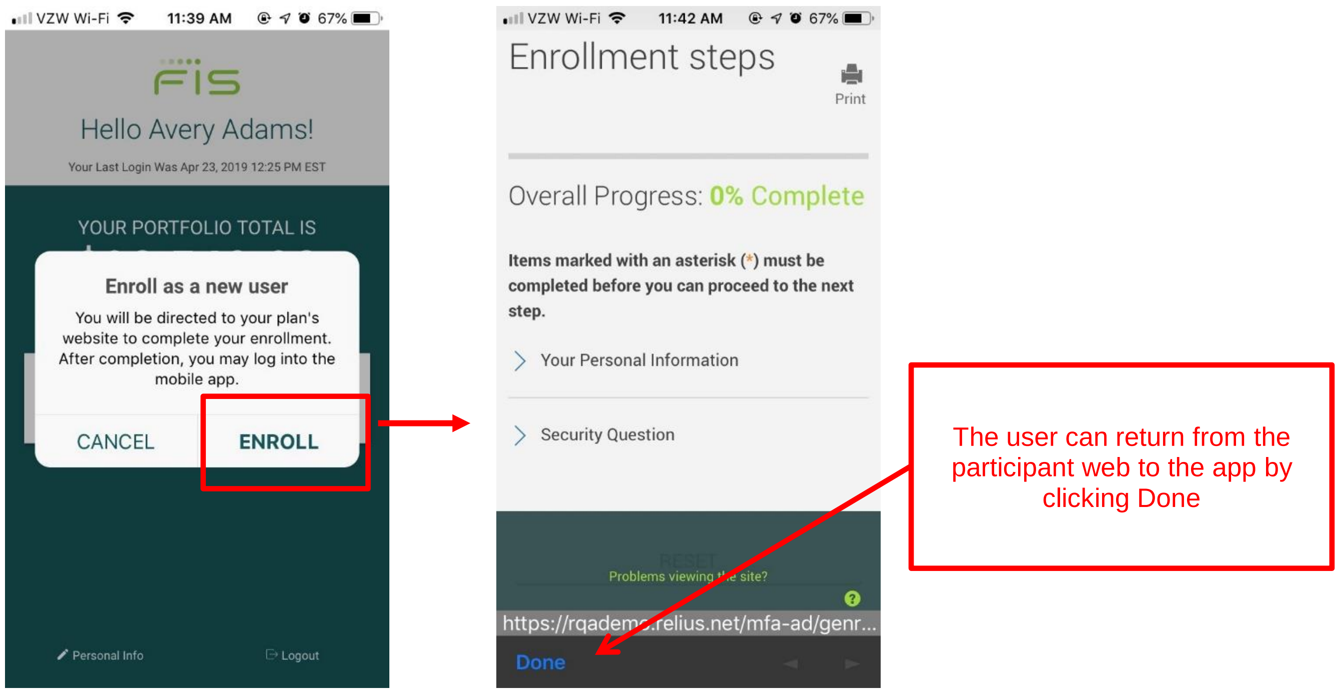
Security questions are turned on or off in Web Options and use the same settings as apply to participant web.





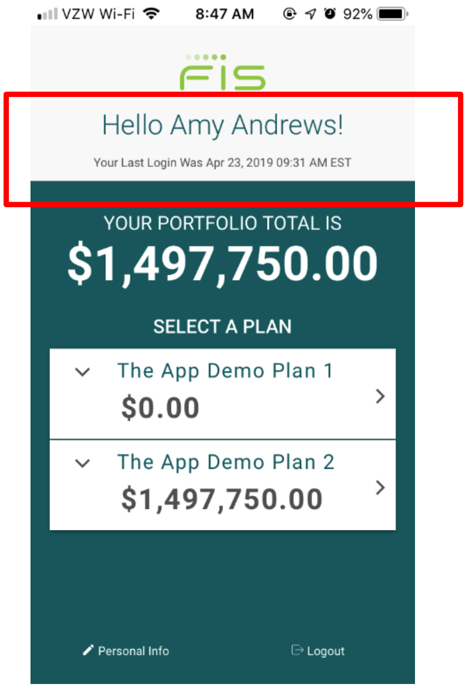
Plan Enrollment Requirements

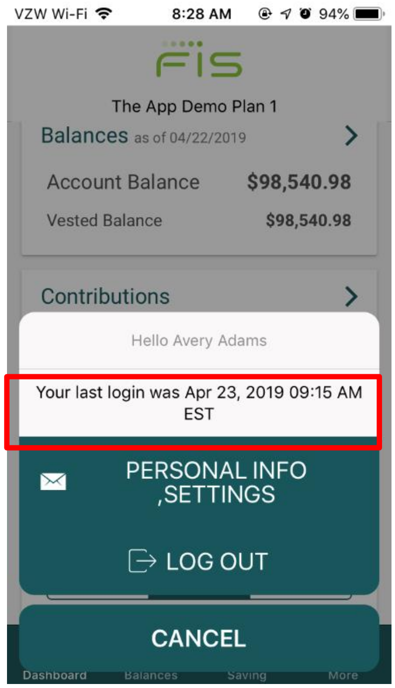
If the participant is subject to automatic enrollment on the web, they will be redirected to participant web to complete the enrollment process prior to accessing their plan on the App.



Welcome banner with last login information

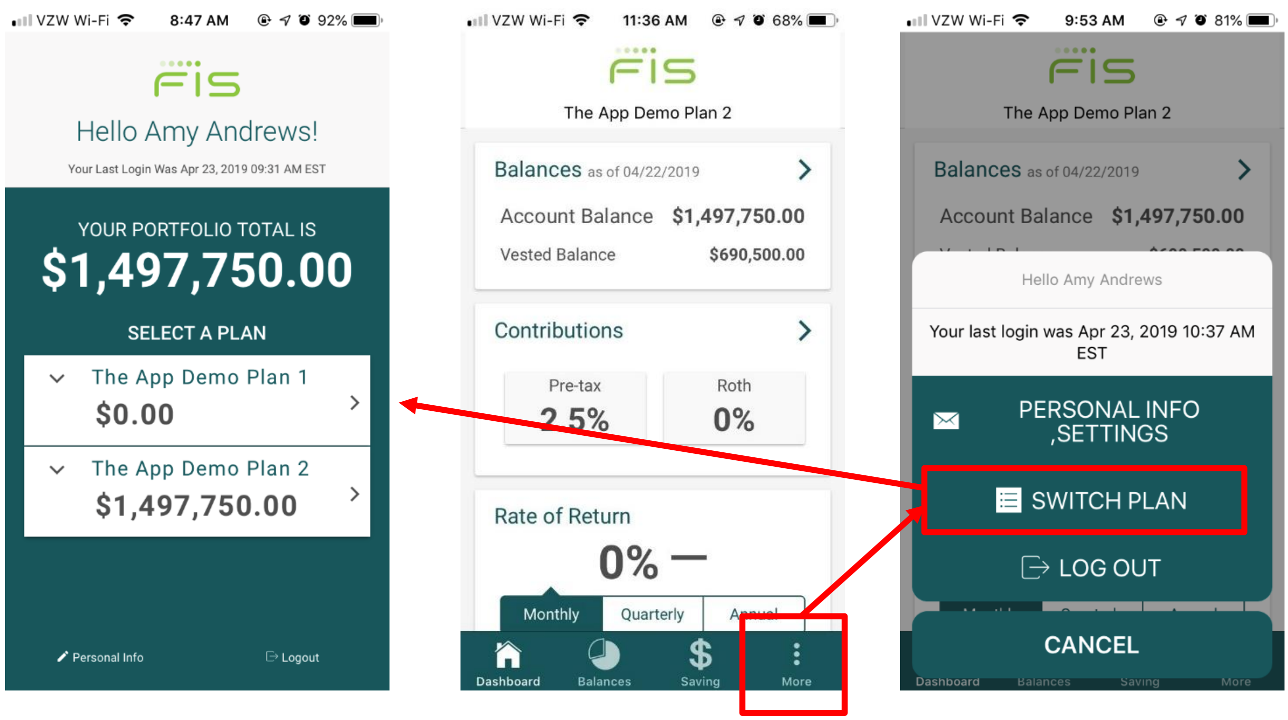
Upon login, the participant will see a Welcome banner with their name and last login date and time. This information can be accessed anytime from within the More menu.





Mobile App Forms - Plan Selection

When the participant has access to more than one plan, the user will be directed to a plan selection page on which the desired plan is selected. The user can later access other plans by selecting the “Switch Plan” menu item from within the More menu.



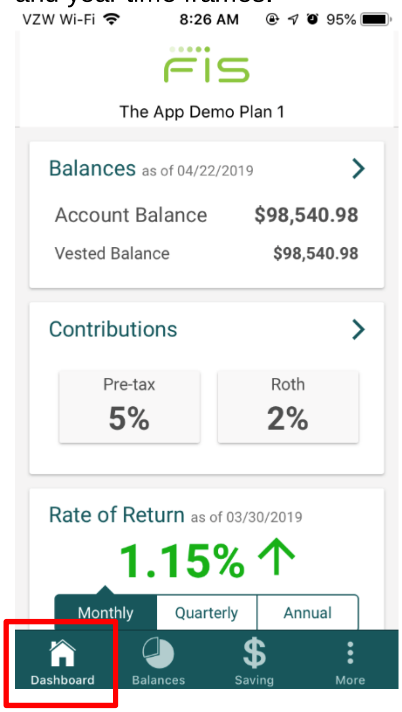
Mobile App Forms - Plan Level Dashboard

The plan level dashboard has three widgets: Balances, Contributions and Personal Rate of Return.

The balance widget provides the balance and vested balance (depending on plan web settings). This panel can be selected to open the dedicated balance page on the App.

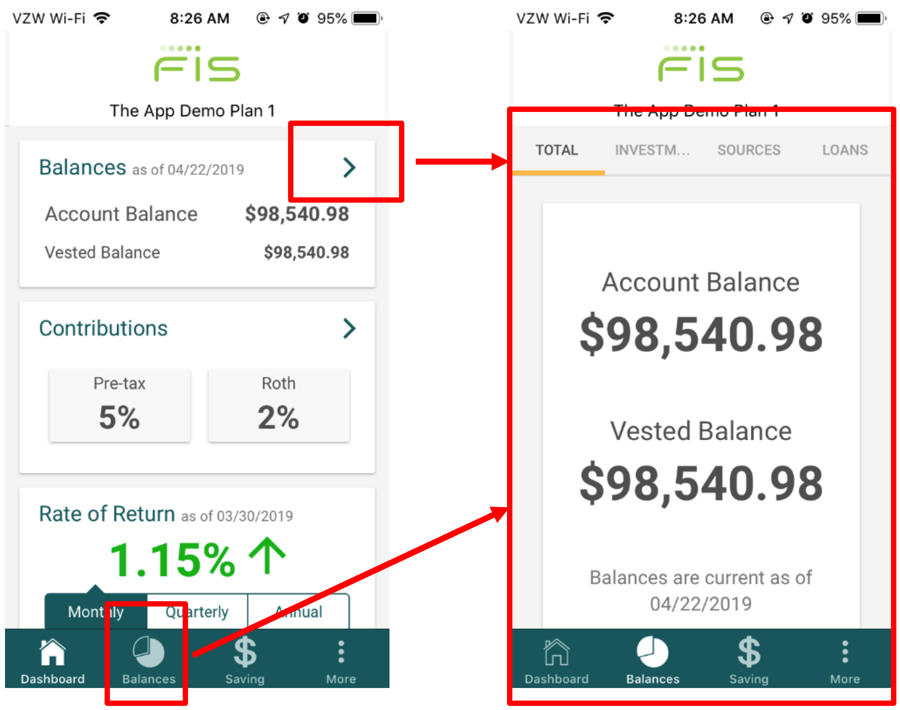
The contribution widget provides the contribution rate elections. Selecting this panel opens the dedicated contribution information page on the App.

The personal rate of return can display the participant's total personal rate of return for the past month, quarter and year time frames.



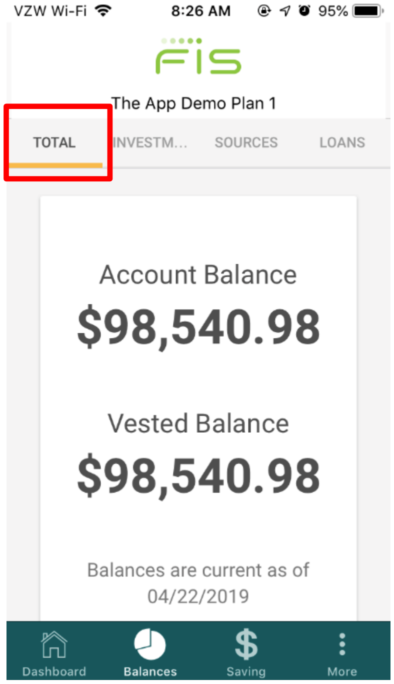
Mobile App Forms - Balances

The dedicated balances page has four views: total balances, balances by investment, balances by source and balances by loan. This page can be accessed by clicking “Balances” on the menu bar or by selecting the balances panel from within the dashboard.



Total Balances

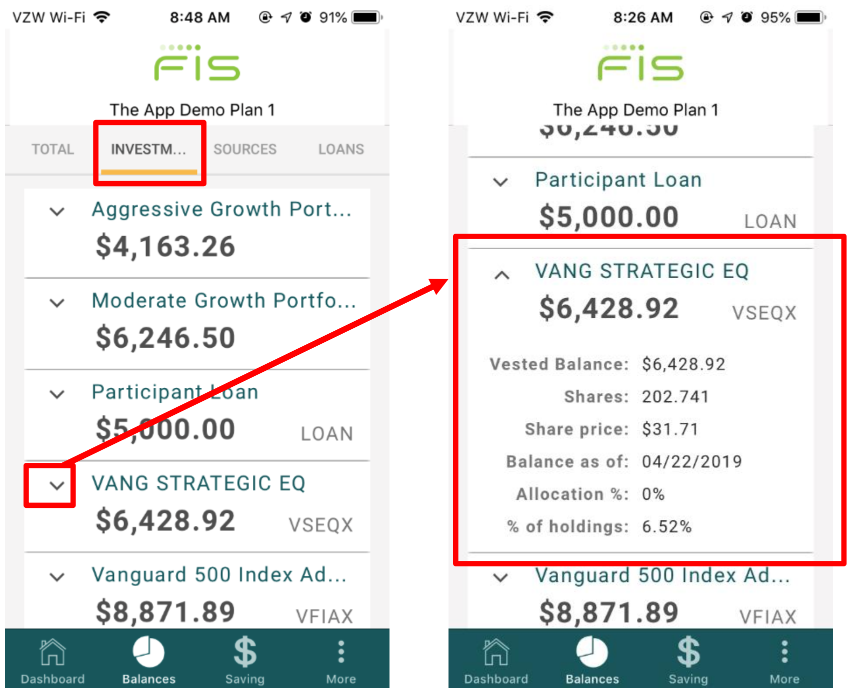
This view displays the total balance (the same as on the dashboard) and, if turned on, total vested balance. It serves as the landing view for the balances page. The user can navigate to the other balance views by selecting the links at the top of the form or by swiping left or right.



Balances by Investment

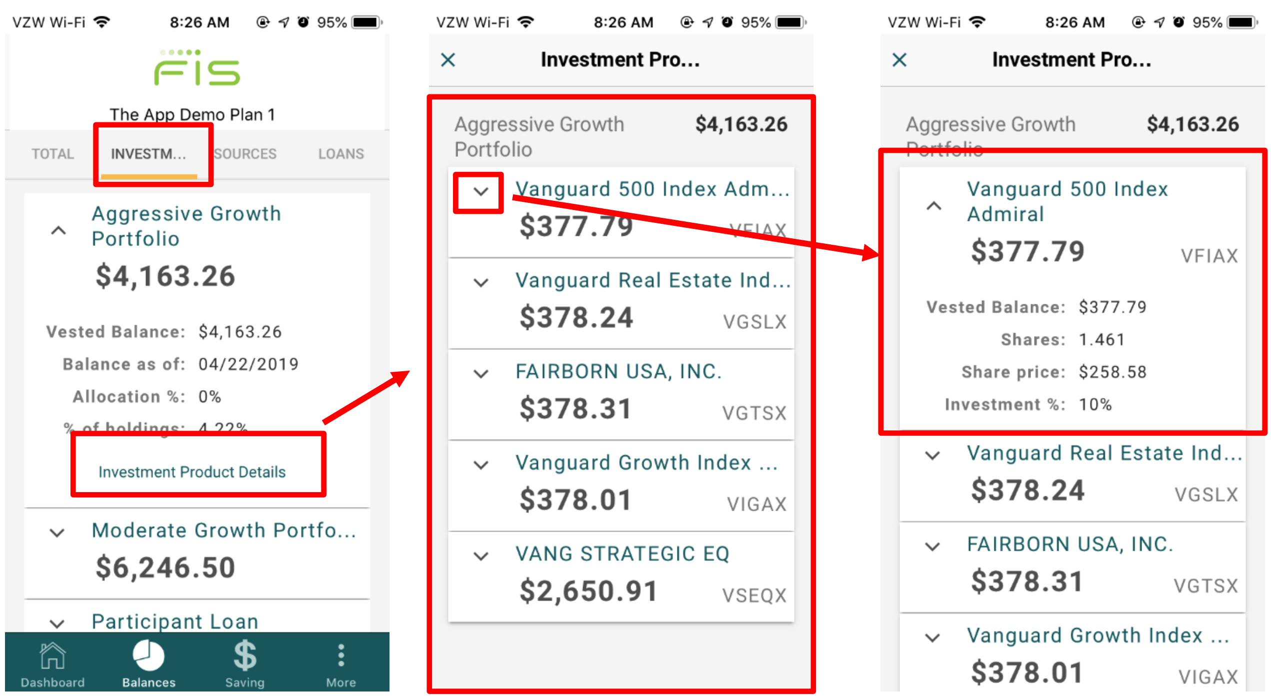
This view displays the balance for each investment. The user can select a panel for the investment to view additional information:

- Fund identifier
- Vested balance
- Shares
- Share price
- As of date
- Allocation % (this is the portion of payroll directed into the investment)
- % of holdings (portion of entire balance that is invested in the fund)



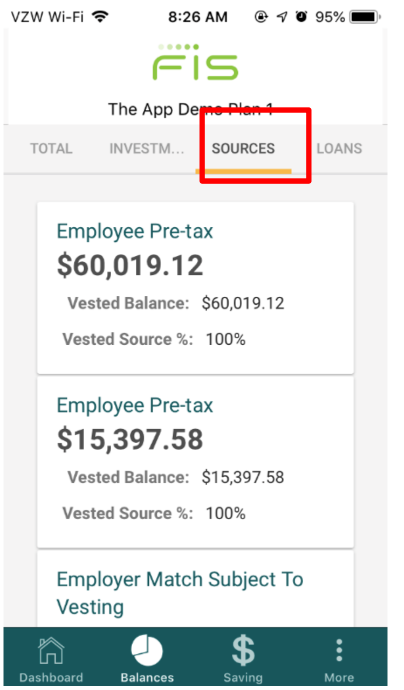
Investment Product Details

If the investment is an investment product, an investment product details link on the balance by investment detail view will open an investment product detail form that will allow the user to see details about the investment product. This shows the balance in each underlying investment in a panel that will expand to show the vested balance, shares, share price, and investment % for each underlying investment.



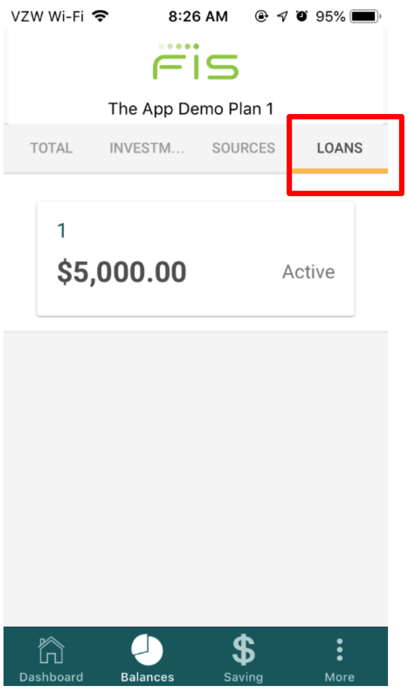
Balance by Source

The balance by source view identifies the total balance within the source as well as the vested balance and the accrued vested % of the source.



Balance by Loan

This view identifies the balance and status of each outstanding loan.



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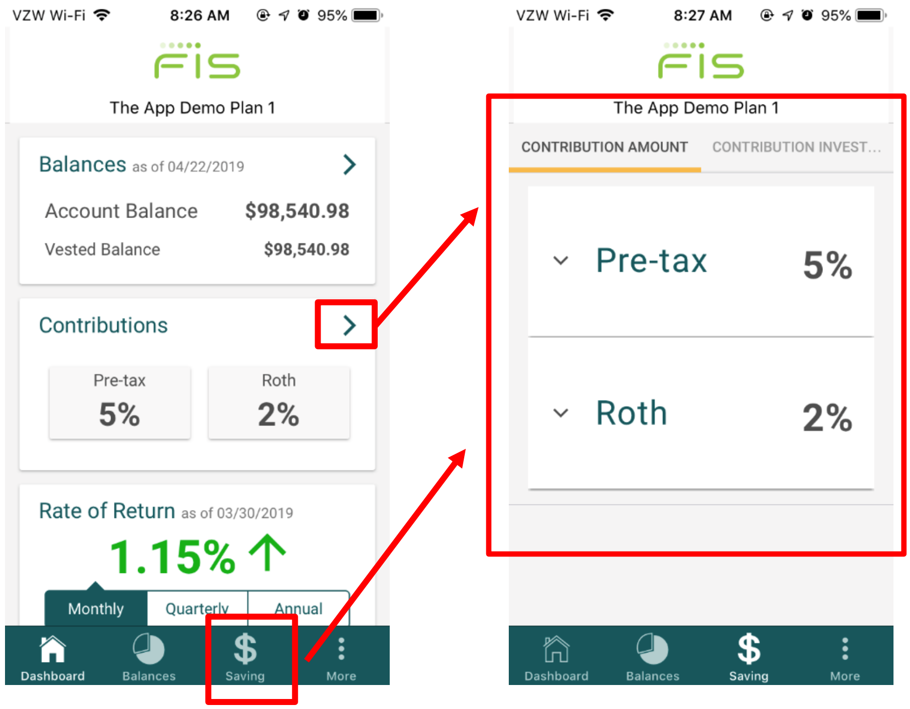
http://relius.net/support/

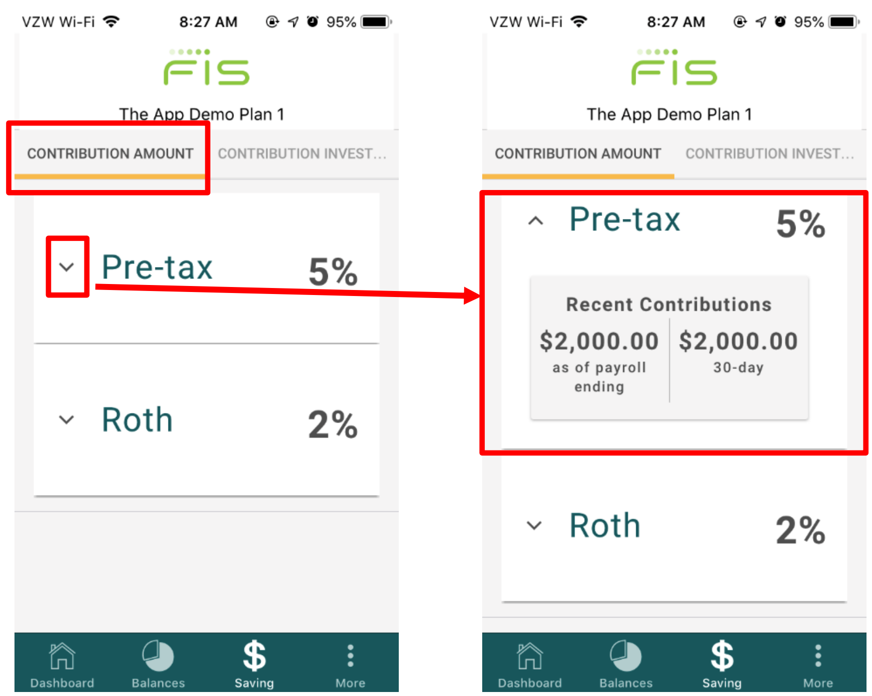
Mobile App Forms – Savings

This form provides information about savings rates and investment directions for new investments. If enabled, the participant can change contribution rates from within the contribution amount tab. If It can be accessed by selecting the Savings icon on the menu bar or by selecting the Contributions panel from within the dashboard. The form has two views: Contribution Amount and Contribution Investments.



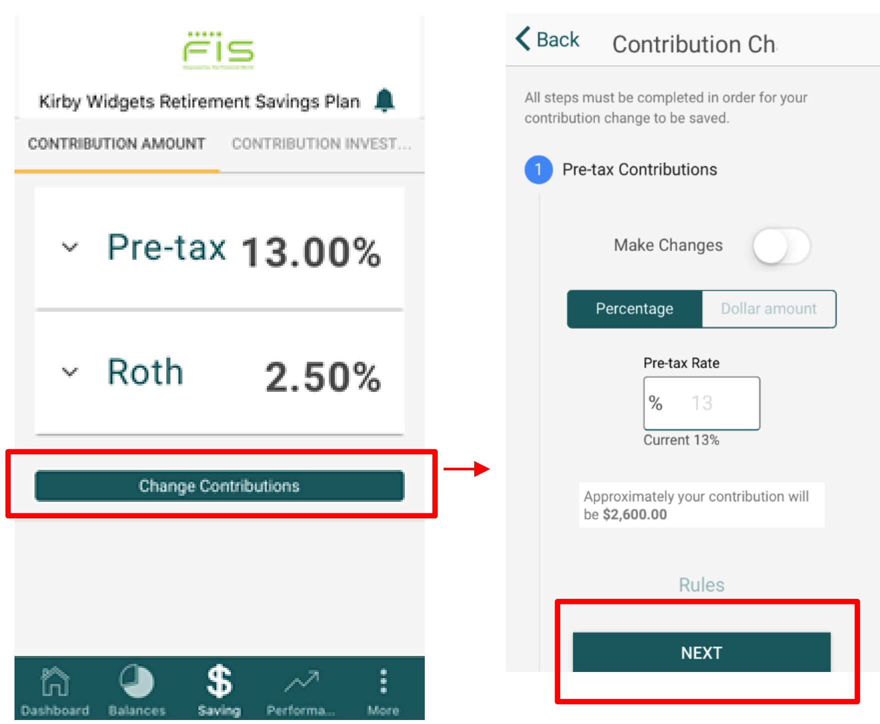
Contribution Amount

This form displays the savings rate or amount per money type. If enabled, this tab will also include an option to create a contribution rate change transaction. Each money type panel can be expanded to see recent contribution information, configurable in plan level web settings. The historical contributions shown here can pull either from payroll or from transactions posted to the ledger, depending on the plan level App settings.



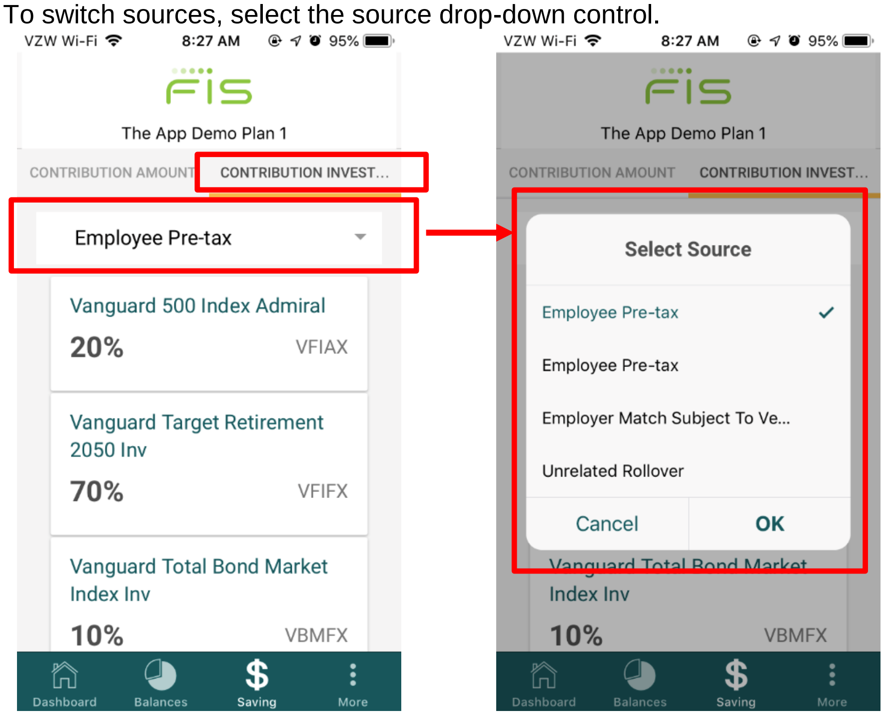
Contribution Change

When contribution change is enabled in the plan's mobile app settings, a Change Contributions button will be visible on the Contribution Amount tab as highlighted below. Clicking this button will open a guided process to allow the user to change contribution rates.



Contribution Investment

This form displays how new contributions are invested (investment elections) for each available source of money. To switch sources, select the source drop-down control.

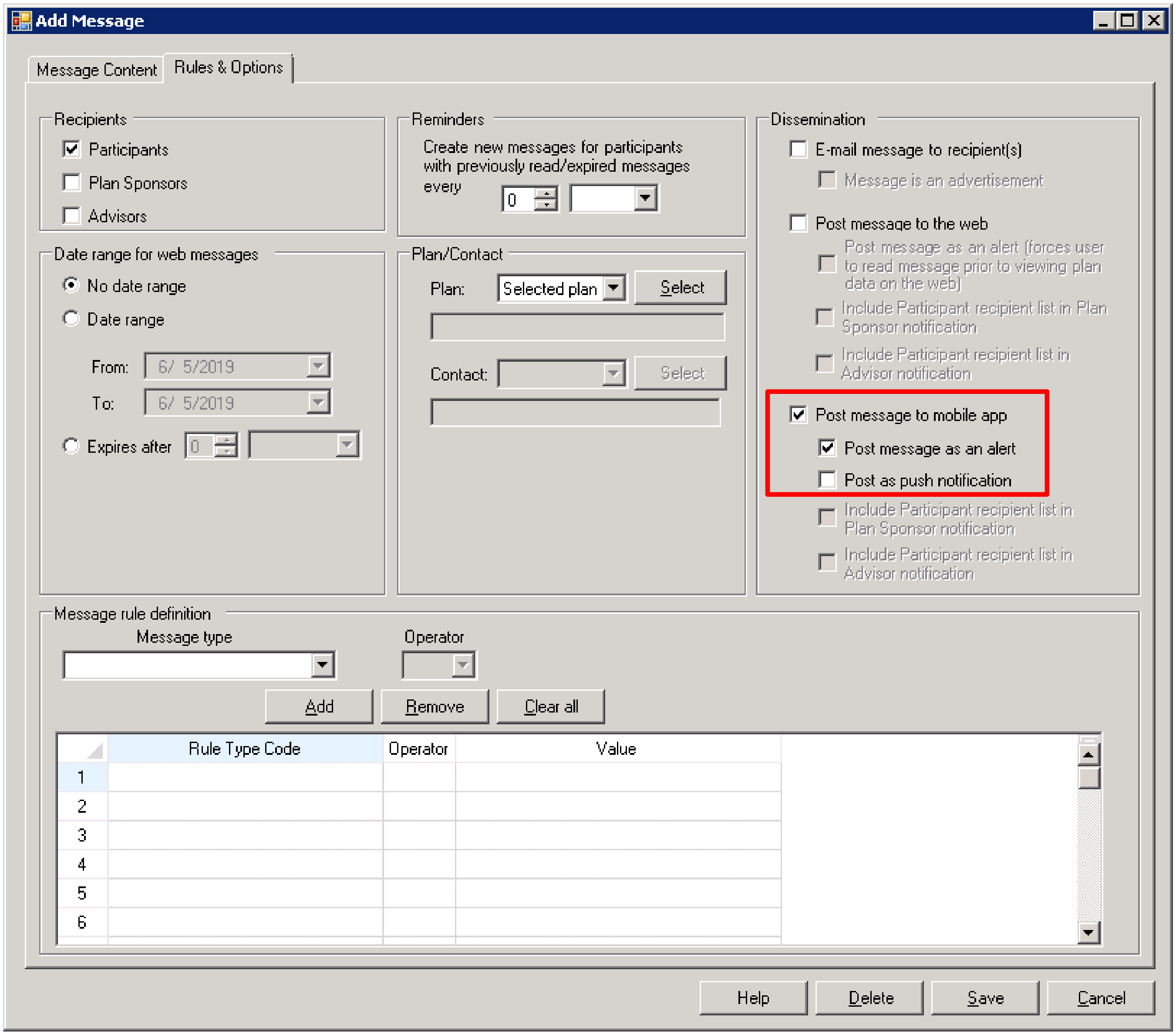


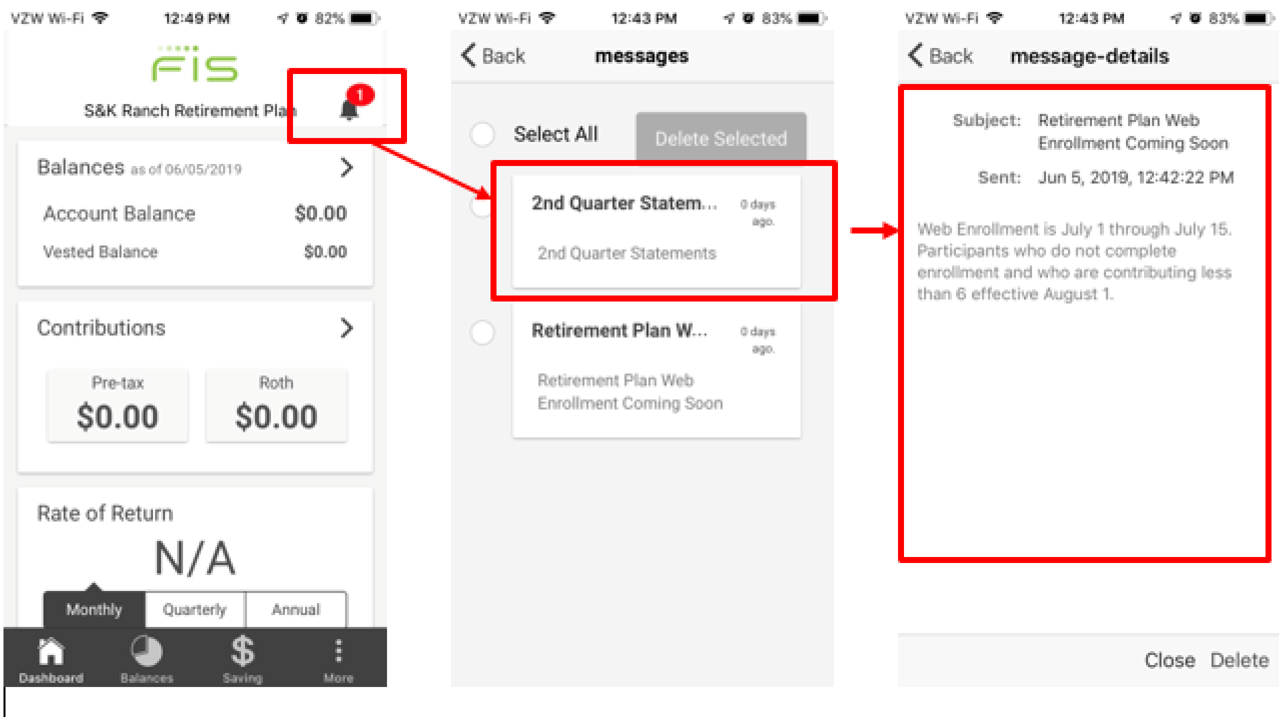
Mobile App Forms – Messaging / Push Notification

Messages may be posted to the Mobile App as well as to the Participant Web. Messages posted to the App will be displayed on the Mobile App form. As with Participant Web, messages posted as alerts will be displayed once the plan is selected. Messaging is accessed via a bell icon at the top of the page.

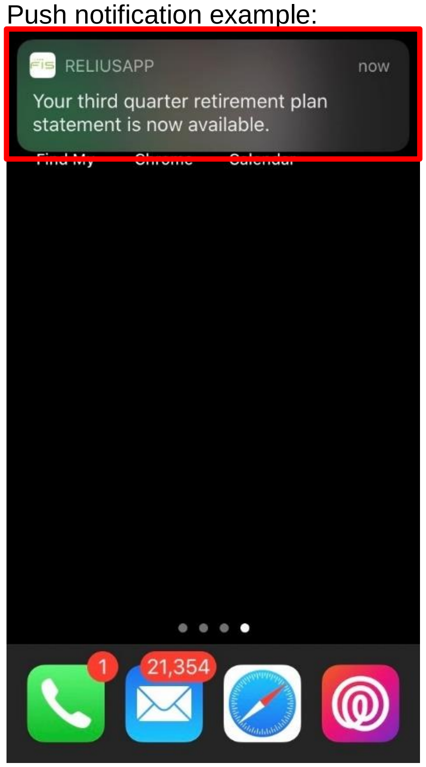
Clients may also send messages in the form of a push notification if enabled in Web Options. Note that push notification does require additional setup outside of Relius Administration including (1) Azure Notification hub setup requiring Microsoft Azure subscription, (2) Android Firebase Cloud messaging setup; and (3) iOS Push Notification Certificate setup. Go to https://relius.net/MobileHelp/Topics/Index.Aspx?topic=PushNotification for detailed technical information regarding Push Notification setup. Messages posted as push notifications display outside of the app on user's devices. Push notifications are visible when the app is closed or is running in the background – they are not shown when the app is actively running in the foreground. Note that due to length limitations of 155 characters per push notification enforced by Android and Apple, only the subject text will be visible as a push notification. The message body will be visible from within the app. Because of the length limitations on push notifications, try to place important keywords at the beginning of the subject and keep the subject as short as possible.

IMPORTANT! If the message will be posted as a push notification, anything in the subject will be visible to the participant on their device without logging into the app. Do not include any sensitive or personal information in the subject text of a message used with push notifications.


Add Message
Message Content
Rules & Options
Recipients
Participants
Plan Sponsors
Advisors
Reminders
Create new messages for participants with previously read/expired messages every
0
Dissemination
E-mail message to recipient(s)
Message is an advertisement
Post message to the web
Post message as an alert (forces user to read message prior to viewing plan data on the web)
Include Participant recipient list in Plan Sponsor notification
Include Participant recipient list in Advisor notification
Post message to mobile app
Post message as an alert
Post as push notification
Include Participant recipient list in Plan Sponsor notification
Include Participant recipient list in Advisor notification
Date range for web messages
No date range
Date range
From:
6/ 5/2019
To:
6/ 5/2019
Expires after
0
Plan/Contact
Plan:
Selected plan
Select
Contact:
Select
Message rule definition
Message type
Operator
Add
Remove
Clear all
Rule Type Code
Operator
Value
1
2
3
4
5
6
Help
Delete
Save
Cancel



Push notification example:



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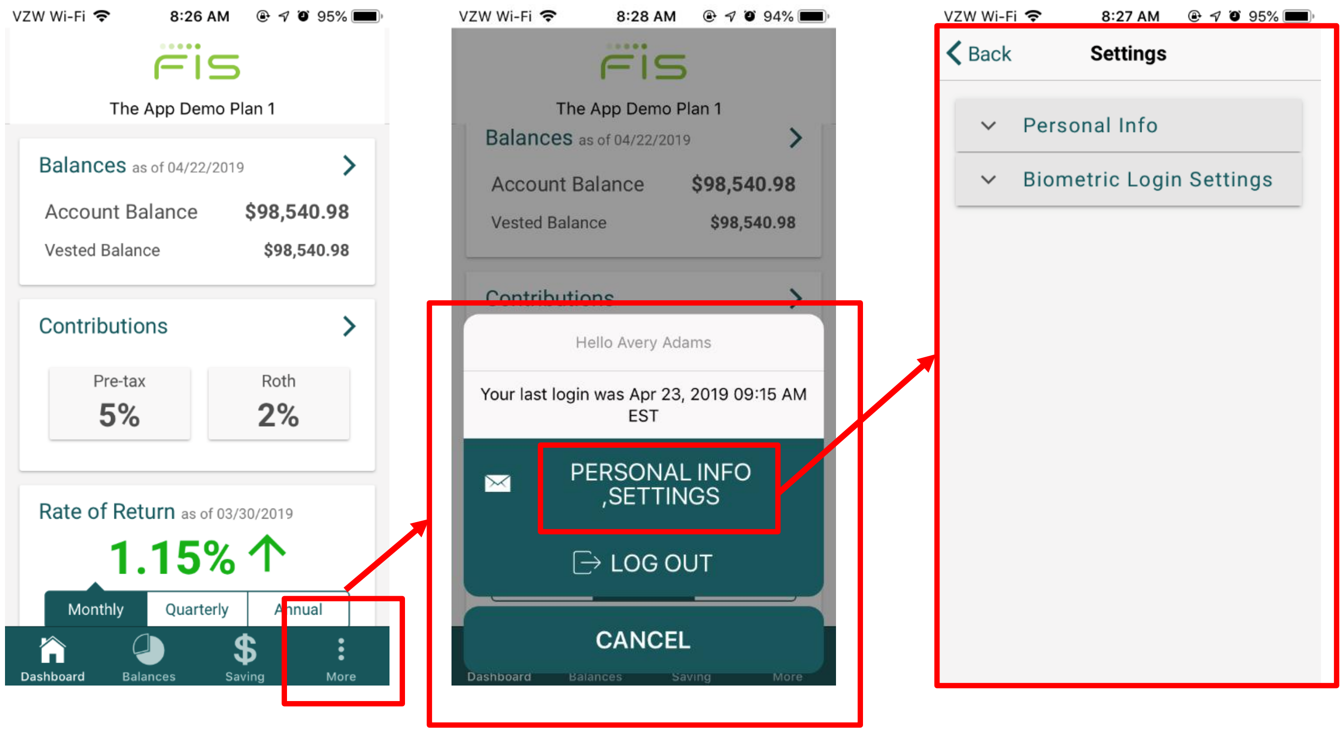
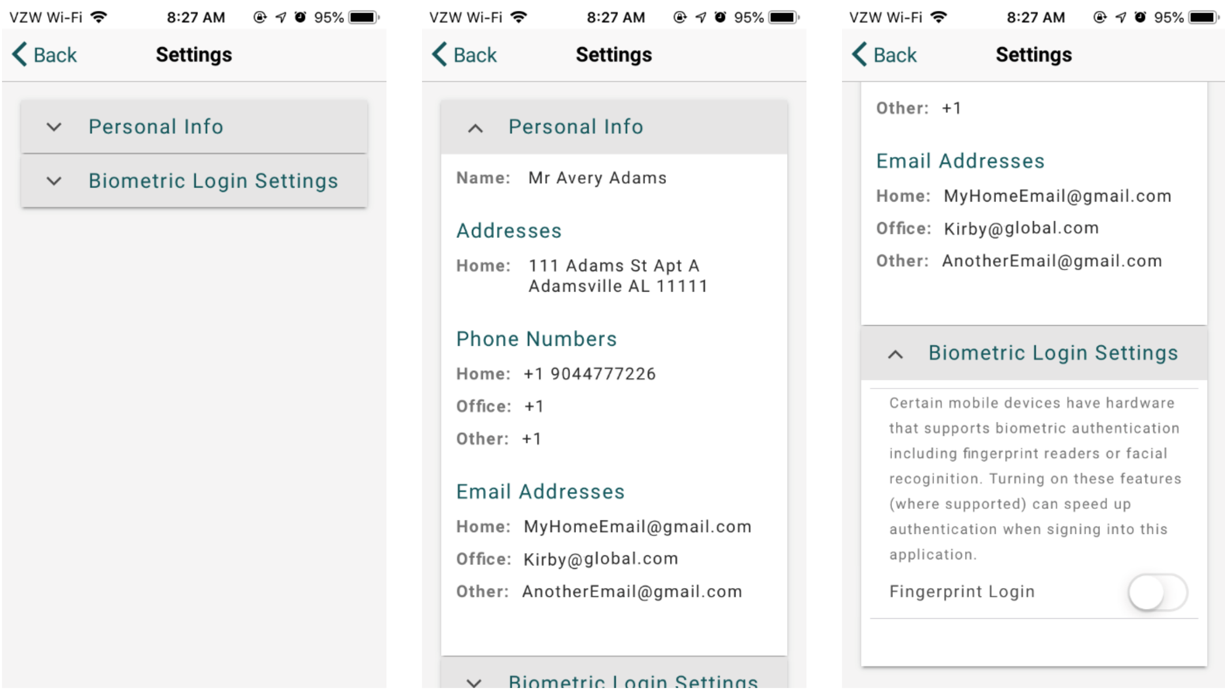
Mobile App Forms - Personal Information

The personal information form contains two accordion panels: Personal Information and Biometric login Settings.

Personal information displays the personal information elements that have been enabled for display for the plan. If the participant is in more than one App-accessible plan, elements available for any of the participant's plans will be displayed on this form.

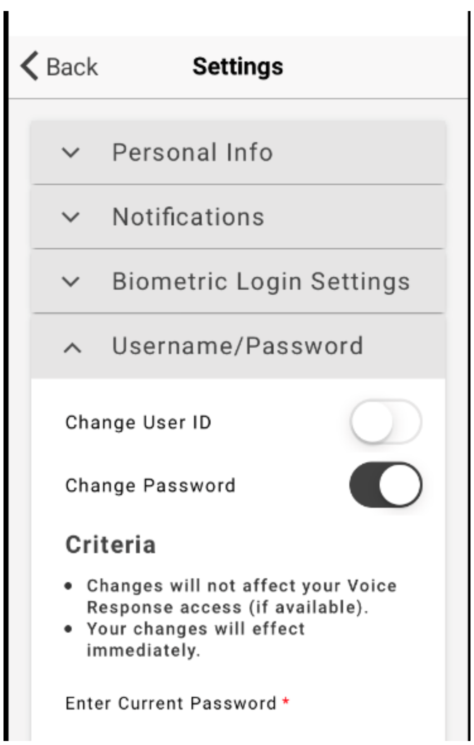
Biometric login settings allow the user to turn on or off biometric access features such as fingerprint.





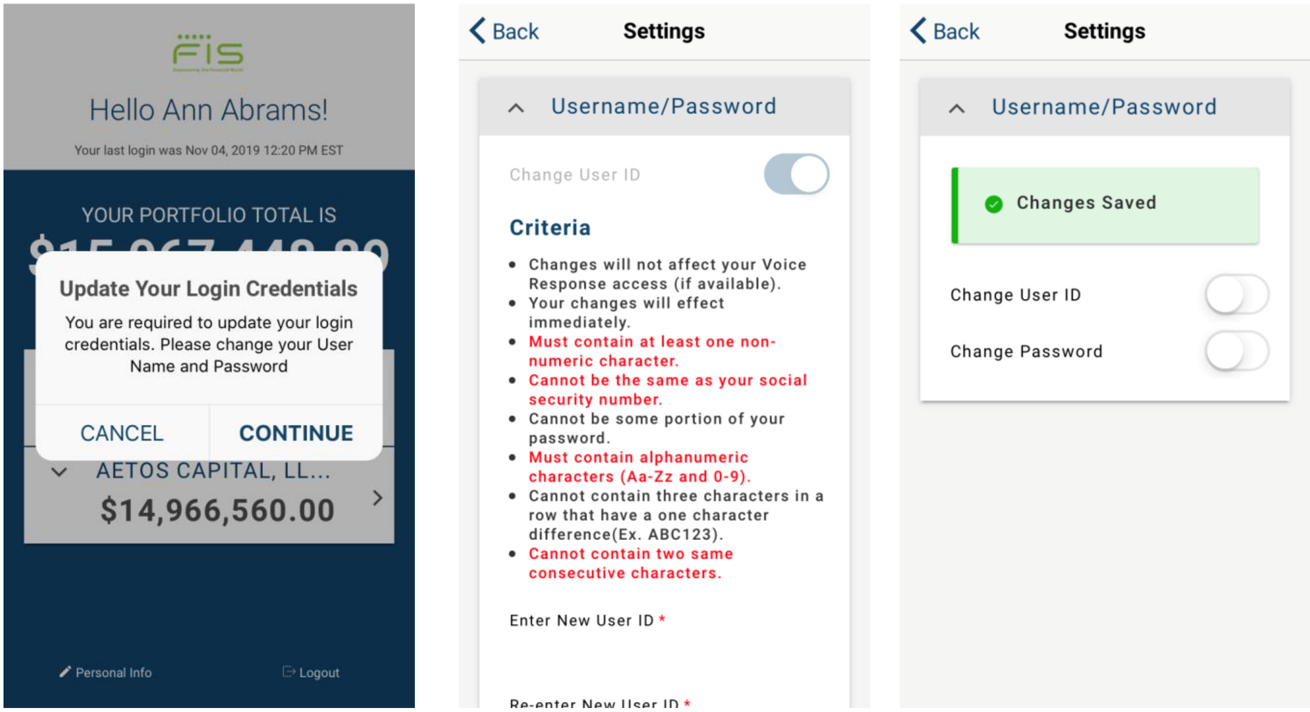
Mobile App Forms – Username/Password Changes

Password and username changes can be made in-app when this option is turned on in the plan's mobile app settings. When enabled, this feature is in the Personal Information menu under the expandable section labeled Username/Password.



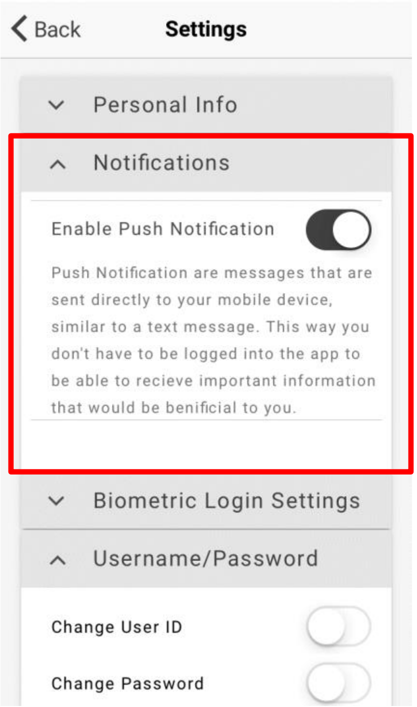
In-app Forced Password Changes

When the plan level mobile app option to allow for password changes is turned on and Web Options are set up in such a way that participants are forced to change username or password, then these password changes can happen in-app. In this case, the personal information form will come up in a special mode that only shows username/password controls. The participant will not be allowed to access any other forms until the credentials are updated.



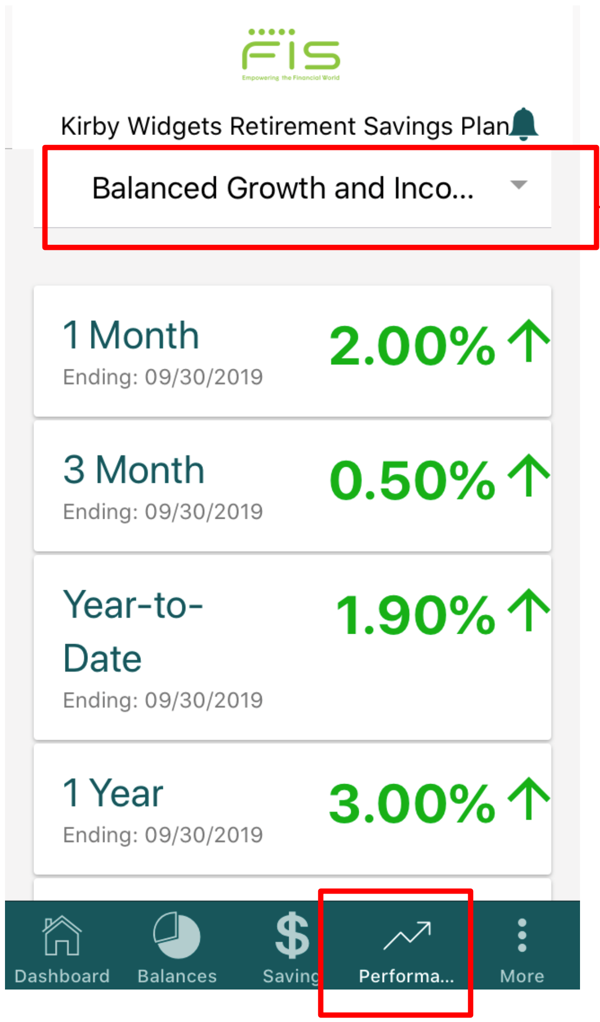
Push Notifications

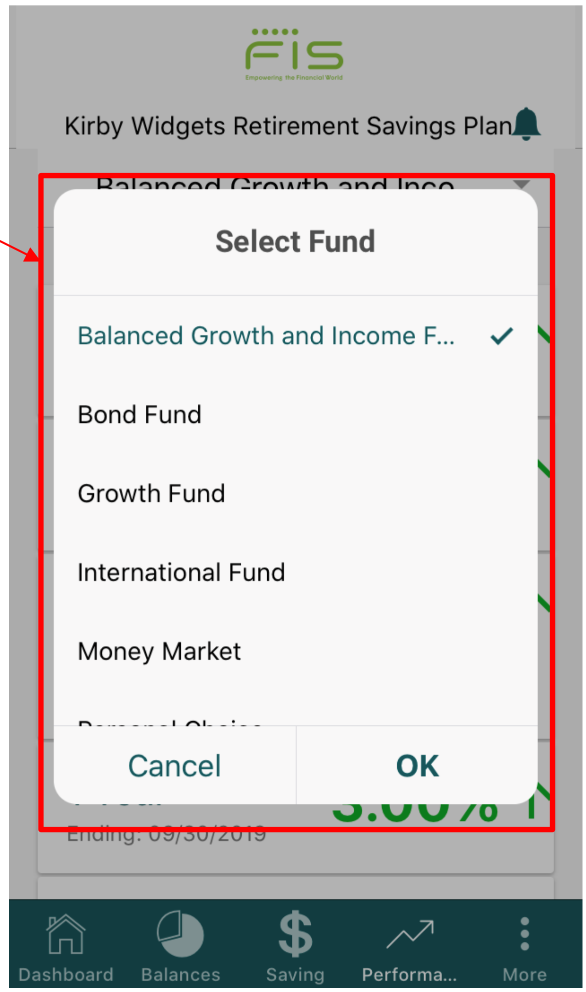
When a user initially logs into the app for a plan that is enabled for push notifications, they will be prompted to answer whether they want to receive push notifications. Additionally, this option can later be turned on or off from the Notifications section of the Personal Information form.


Back
Settings
Personal Info
Notifications
Enable Push Notification
Push Notification are messages that are sent directly to your mobile device, similar to a text message. This way you don't have to be logged into the app to be able to recieve important information that would be benificial to you.
Biometric Login Settings
Username/Password
Change User ID
Change Password

Mobile App Forms – Investment Performance

When the plan level mobile app option is turned on to display investment performance on the app, a performance menu item will display on the main menu bar which will open the investment performance form. Here, the user can view investment performance by selecting an investment in the drop-down box at the top of the form to see all the performance statistics enabled by the plan and available for the investment.





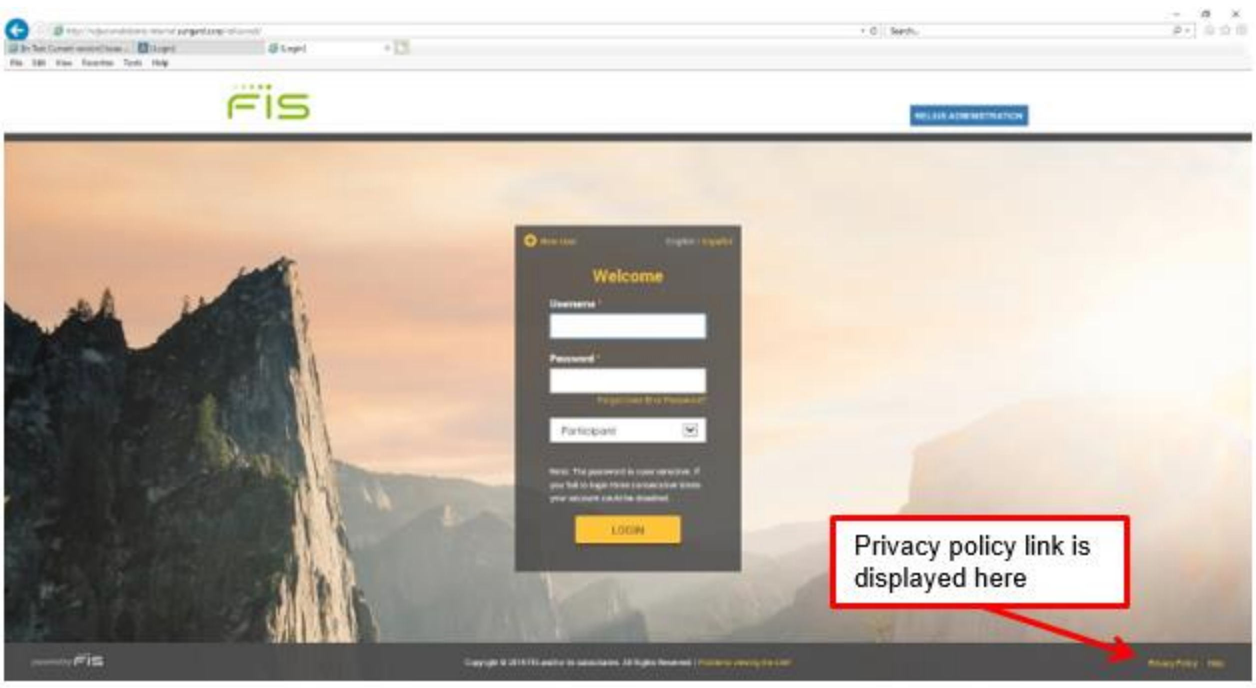
Privacy Policy

A privacy policy URL is required to add the App to the App store for Apple. This URL is visible to the end user when viewing the app within the app store.

To support this requirement for clients not already hosting a privacy policy elsewhere, it is now possible to host the policy on the participant web site using the new customizable privacy policy page https://<YourParticipantWebURL>/privacypolicy.aspx . The policy can be accessed from a link at the bottom of the login page of the participant web and does not require the user to enter a username/password.

Content on this page is controlled by populating new custom text elements accessible in custom text under the Privacy Policy node. The name of the link, shown on the login page, is the value entered into the LINKNAME custom text element. Clients not wishing to make use of the privacy policy link should leave this element blank, which it is by default. When blank, the link will not display on the login page.

Clients must develop their own privacy policy language. Default language may not be furnished by FIS for this purpose and the FIS policy URL may not be used by our clients. However, as an example, here is the FIS privacy policy: *https://www.fisglobal.com/privacy*



Appendix A – Technical Guide Links

Sample themes can be viewed here:
https://relius.net/MobileHelp/Topics/Index.Aspx?topic=ClientOnboarding#Common-Theme

View detailed information about our certificate generation utility here:
https://relius.net/MobileHelp/Topics/Index.Aspx?topic=CertUtility

Technical information about enrolling as a company for the apple developer program is available here:
https://relius.net/MobileHelp/Topics/Index.Aspx?topic=AppleEnrollment#AppleDevProg

Technical information about setting up a google play developer account is located here:
https://relius.net/MobileHelp/Topics/Index.Aspx?topic=GoogleDeveloperAccount

For technical details about setup outside of Relius Administration for push notifications, see this link:
https://relius.net/MobileHelp/Topics/Index.Aspx?topic=PushNotification

Appendix B – Sample End User License Agreement (EULA)

English version

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4. Disclaimer of Warranty. THE SOFTWARE IS PROVIDED ON AN 'AS IS' AND 'AS AVAILABLE' BASIS WITHOUT WARRANTIES OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT. NO WARRANTY IS PROVIDED THAT THE SOFTWARE WILL BE FREE FROM DEFECTS OR VIRUSES OR THAT OPERATION OF THE SOFTWARE WILL BE UNINTERRUPTED. YOUR USE OF THE SOFTWARE AND ANY OTHER MATERIAL OR SERVICES DOWNLOADED OR MADE AVAILABLE TO YOU THROUGH THE SOFTWARE IS AT YOUR OWN DISCRETION AND RISK, AND YOU ARE SOLELY RESPONSIBLE FOR ANY DAMAGE RESULTING FROM THEIR USE.

5. Limitation of Liability. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT WILL LICENSOR , THE PROVIDER OF ANY FINANCIAL SERVICES AVAILABLE THROUGH OR RELATED TO THE SOFTWARE, ANY OF THEIR CONTRACTORS OR PROVIDERS OR ANY OF EACH OF THEIR AFFILIATES BE LIABLE FOR ANY DAMAGES ARISING OUT OF THE USE OR INABILITY TO USE THE SOFTWARE, INCLUDING BUT NOT LIMITED TO ANY GENERAL, SPECIAL, INCIDENTAL OR CONSEQUENTIAL DAMAGES, EVEN IF ADVISED OF THE POSSIBILITY THEREOF, AND REGARDLESS OF THE LEGAL OR EQUITABLE THEORY (CONTRACT, TORT OR OTHERWISE) UPON WHICH ANY CLAIM IS BASED. IN ANY CASE, LIABILITY OF LICENSOR OR ANY OF THE OTHER PERSONS OR ENTITIES DESCRIBED IN THE PRECEDING SENTENCE ARISING OUT OF THE USE OR INABILITY TO USE THE SOFTWARE SHALL NOT EXCEED IN THE AGGREGATE THE LESSER OF $10.00 OR THE SUM OF THE FEES PAID BY YOU FOR THIS LICENSE.

6. U.S. Government Restricted Rights. The Software is commercial computer software subject to RESTRICTED RIGHTS. In accordance with 48 CFR 12.212 (Computer software) or DFARS 227.7202 (Commercial computer software and commercial computer software documentation), as applicable, the use, duplication, and disclosure of the Software by the United States of America, its agencies or instrumentalities is subject to the restrictions set forth in this Agreement.

7. Miscellaneous. This Agreement constitutes the entire agreement between the parties concerning the subject matter hereof. This Agreement will be governed by and construed in accordance with the laws of the state of Florida, excluding that body of laws pertaining to conflict of laws. If any provision of this Agreement is determined by a court of law to be illegal or unenforceable, such provision will be enforced to the maximum extent possible and the other provisions will remain effective and enforceable. All disputes relating to this Agreement are subject to the exclusive jurisdiction of the courts of Florida and the parties expressly consent to jurisdiction and venue thereof and therein. The parties confirm that this Agreement and all related documentation is and will be in the English language. The application of the United Nations Convention on Contracts for the International Sale of Goods is hereby expressly waived and excluded.

8. Content and Services. Neither Licensor nor the provider of the wireless network is the provider of any financial services available through or related to the Software, and neither Licensor nor the provider of the wireless network or any contractor of the provider of the financial services available through or related to the Software, is responsible for any of the materials, information, products or services made available to you via the Software.

Spanish version

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2. Licencia. Sujeto a los términos y condiciones de este Acuerdo, mediante el presente se le otorga una licencia limitada no exclusiva para usar el Software, de conformidad con los términos de este Acuerdo. Todos los derechos que no se le otorguen de manera expresa mediante este Acuerdo quedan reservados para el Licenciante, en virtud de este documento. Ninguna disposición incluida en esta licencia le otorga ningún derecho a recibir documentación impresa, asistencia técnica, asistencia telefónica ni actualizaciones del Software. Este Acuerdo se puede rescindir en cualquier momento, por cualquier motivo o sin motivo. Luego de tal rescisión, acepta destruir de inmediato todas las copias del Software que estén en su posesión o control.

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