Transaction Log

08/16/2024 3:58 pm CDT

To view the summary of a change set, click on **Update** which will provide a pop-up of the Transaction List.

The top of the Transaction List provides the Plan Name, which user made the Update and the Date and Time range of the session when the changes were made. Each time the user logs in, the Transaction List will record a new session for all changes the user makes which lasts until the user logs out of the system. Additionally, changing a plan's checklist by converting a plan will end the user's session and start a new session, creating multiple entries in the Show History log. The Section, Line No and Question columns refer to the part of the checklist that was changed. The Old Value is the value prior to the change and the New Value is the value replacing the Old Value. Note: The user may not have changed some of the values directly: due to other checklist options being enabled or disabled. For example, in the screen shot above, Line 23a was changed to 'No', which disabled Line 23b since the value was no longer pertinent.

Revert

From the Show History screen, Designated Admin users can also revert changes made during each session and all changes following that session effectively rolling back the Plan Document to the state prior to the selected entry. To revert changes, click **Revert** at a point in the checklist change history that you would like to revert to. **Note:** Clicking **Revert** will undo all changes made during the session you have selected. Reverting changes also creates a record in the Show History log, and reverts can also be reverted.

Revert Plan Checklist Values

Plan:	Apu's Pension Plan (div A)
Revert To:	Values prior to 2014-02-07 12:00:58

Please confirm the resulting changes.
New values shown in **bold**.
Click 'OK' below to apply these changes.

Section	Line No	Question	Current Value	Revert Value	Imposed Default
A	3a	Original effective date of Plan:	just a test	**(BLANK)**	
A	3c	If **A.3b** is "Yes", effective date of Plan restatement:	yet another test	**(BLANK)**	
I	1	Enter custom language that is to be added as an Addendum to the Adoption Agreement.	Some custom language la-alalalala	**(BLANK)**	
A	20a	Definition of Compensation:	Withholding	**W-2**	
A	23d	If **A.23c** is "Yes", effective date of using Post Year End Compensation shall be limitation years beginning on or after:	something...	**(DISABLED)**	
A	23c	Compensation is determined using Post Year End Compensation:	Yes	**No**	

OK   Cancel

The Revert Plan Checklist Values dialogue summarizes all values that will be reverted, including the current values and the values the checklist will be reverted back to. If you would like to cancel the revert, just click **Cancel**.

Pressing **OK** from the Revert Plan Checklist Values dialog will provide you with a confirmation, reporting the changes successfully made during the revert.

Revert Plan Checklist Values

Plan:	Apu's Pension Plan (div A)
Revert To:	Values prior to 2014-02-10 17:03:36

Success!
New values are shown in **bold.**

Section	Line No	Question	Old Value	Revert Value	Imposed Default
A	23a	Include **Post Severance Compensation**:	No	**Yes**	
A	23c	Compensation is determined using Post Year End Compensation:	Yes	**No**	

Close

After completing a revert, you can see the entry in the Show History log of the revert itself:

Revert	nick	UPDATE	Plan Document	DefBen-DB	2014-02-11 15:26:04	Revert to values prior to 2014-02-10 17:03:36