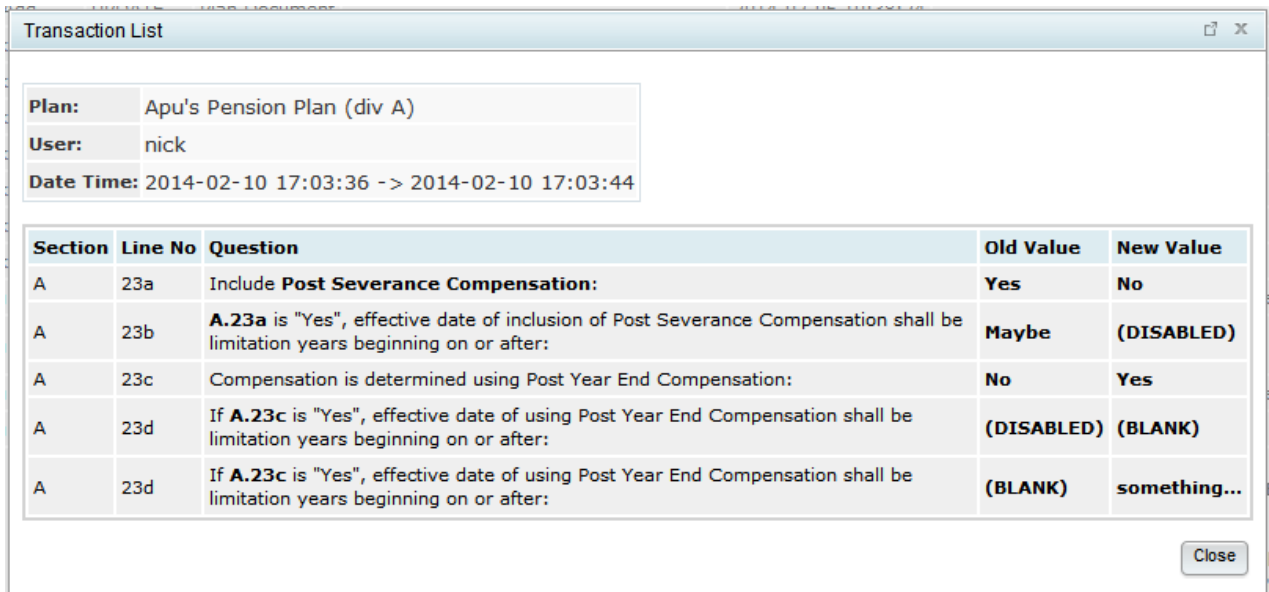


Show History screen

08/16/2024 4:01 pm CDT

Transaction Log

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



The screenshot shows a window titled "Transaction List" with a close button in the top right corner. Inside the window, there is a summary section and a table of changes.

Plan: Apu's Pension Plan (div A)
User: nick
Date Time: 2014-02-10 17:03:36 -> 2014-02-10 17:03:44

Section	Line No	Question	Old Value	New Value
A	23a	Include Post Severance Compensation :	Yes	No
A	23b	A.23a is "Yes", effective date of inclusion of Post Severance Compensation shall be limitation years beginning on or after:	Maybe	(DISABLED)
A	23c	Compensation is determined using Post Year End Compensation:	No	Yes
A	23d	If A.23c is "Yes", effective date of using Post Year End Compensation shall be limitation years beginning on or after:	(DISABLED)	(BLANK)
A	23d	If A.23c is "Yes", effective date of using Post Year End Compensation shall be limitation years beginning on or after:	(BLANK)	something...

Close

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 x

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 x

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
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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.

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	

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.

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	

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
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Show History

The Show History screen enables you to review all modifications made to plan documents, displaying which user made the changes, when and what changes the user made. Designated Administrative users can also revert changes made to plan document checklists from this screen.

Plan Menu

- [Convert Plan](#)
- [Clone Plan](#)
- [Delete Plan](#)
- [Show History](#)
- [Workflow Plan Specifications](#)
- [New & Coming Soon!](#)

To access the Show History screen, click **Show History** in the top right corner on the Edit Plan screen under the Plan Menu for any plan.

[Home](#) > [Edit Company](#) > [Edit Plan](#) > History

[Help](#)

Company:	Quick-E Mart (div A) test	ID:	QuickE
Plan:	Apu's Pension Plan (div A)	ID:	
Checklist:	Defined Benefit Pension Plan (Proto Format) - EGTRRA		
Details:	EIN: 222222222 • PN: ??? • PYE: ???		

	User	Type	Module	Document/Area	Date	Note	Error
	test user	ADD	Plan Document	All	2014-02-04 10:43:42	Added Via Cloning, copied from [Quick-E Mart 401(k) (div A);]	
	test user:	UPDATE	Plan Document	Misc-WL	2014-02-04 10:44:57	ConvertFrom=ProtoNS:4K; ConvertTo=:Misc:WL	
	test user	UPDATE	Plan Document	Welfare-Cafe	2014-02-04 10:45:22	ConvertFrom=Misc:WL; ConvertTo=EGTRRA:Welfare:Cafe	
	test user	UPDATE	Plan Document	Welfare-Cafe	2014-02-04 10:45:45		
	nick	UPDATE	Plan Document	Welfare-Cafe	2014-02-05 11:15:55		
	nick	UPDATE	Plan Document	Misc-WL	2014-02-05 11:16:00	ConvertFrom=Welfare:Cafe; ConvertTo=:Misc:WL	
	nick	UPDATE	Plan Document	DefBen-DB	2014-02-05 11:17:13	ConvertFrom=Misc:WL; ConvertTo=EGTRRA:DefBen:DB	
	Apu N.	UPDATE	Plan Document	General Information	2014-02-06 10:38:24		
	Apu N.	UPDATE	Plan Document		2014-02-06 10:38:24		
Revert	nick	UPDATE	Plan Document	DefBen-DB	2014-02-07 12:00:58		
Revert	nick	UPDATE	Plan Document	DefBen-DB	2014-02-10 16:49:21		
Revert	nick	UPDATE	Plan Document	DefBen-DB	2014-02-10 16:59:24		
Revert	nick	UPDATE	Plan Document	DefBen-DB	2014-02-10 17:03:36		
	nick	GENERATE	Docs	Adoption Agreement	2014-02-11 10:29:20		
	nick	GENERATE	Plan Document	Plan Document	2014-02-11 10:29:37		
	nick	GENERATE	Plan Document	Plan Document	2014-02-11 10:29:42		
	Apu N.	UPDATE	Portal		2014-02-11 11:40:01	update=add;username=1lmo;module=5500;	
	Apu N.	UPDATE	Portal		2014-02-11 11:40:01	update=add;username=1lmo; module=Document;	
	Apu N.	UPDATE	Portal		2014-02-11 11:40:01	update=add;username=1lmo;module=5500;	
	Apu N.	UPDATE	Portal		2014-02-11 11:40:14	View5500=Yes;	

The Show History screen also shows history such as when documents were generated, forms were printed, and updates were made changes to Portal users, etc for the selected plan. The Note column offers more details regarding the change; all changes you have made in the Plan Document module are logged, and you can click **Update** in the Type column to view any set of changes to the plan documents.