

9.3.3. Custom Reports

10/29/2024 4:34 pm CDT

Certain reports in the Compliance Module are able to be customized, giving the ability to add, move and remove columns; change table column widths; change font type, size and color; filter to show only certain data; and change sort order. These changes can then be saved and used for all of your plans.

Accessing Custom Reports

Custom reports are located throughout the software. Below is a list of current reports and where they are located.

Report Name	Location
402(g) Limit Test	Scrub/Eligibility Reports
HCE Next Year	Scrub/Eligibility Reports
Top Heavy Minimum Allocation	Allocation Reports
Catchup and Excess	Miscellaneous Reports
RMD Notice	RMD Menu

Editing Custom Reports

Custom reports can be edited by clicking on the custom report icon (



) that appears next to all custom reports. This opens the report in a web view, where the user can add or remove columns, change text font type, sizes or colors, rearrange column positions, filter the report to only show certain criteria or change the sort order.

Below is a screenshot of the Scrub/Eligibility Report window. There are two custom reports here; the 402(g) Limit Test and HCE Next Year. Both of these reports have the custom report icon (



), which will access the web view of the applicable report.



Clicking on a column within the web view will make the formatting options appear for that column. The left most icon has three options: Formatting, Hide column, and Show columns.

Demo Plan 402(g) Report - Detail 12/31/2016								
SSN	Status	Comp	401(k)	Roth	Total Deferrals	402(g) Catchup	402(g) Excess	
	Active	\$50,000.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$0.00	
	Active	\$50,000.00	\$4,000.00	\$0.00	\$4,000.00	\$0.00	\$0.00	
	Active	\$50,000.00	\$4,000.00	\$0.00	\$4,000.00	\$0.00	\$0.00	
Employee4, EE4	Active	\$50,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Employee5, EE5	Active	\$31,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Employee6, EE6	Active	\$35,000.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$0.00	
Employee7, EE7	Active	\$45,000.00	\$3,000.00	\$0.00	\$3,000.00	\$0.00	\$0.00	
Employee8, EE8	Active	\$25,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Owner1, EE01	Active	\$245,000.00	\$24,000.00	\$0.00	\$24,000.00	\$6,000.00	\$0.00	
Owner2, EE02	Active	\$245,000.00	\$18,000.00	\$0.00	\$18,000.00	\$0.00	\$0.00	
Total		\$866,000.00	\$57,000.00	\$0.00	\$57,000.00	\$6,000.00	\$0.00	

Clicking on the formatting option will open a new window with all of the font style, color and sizing options. Alignment options and conditional formatting options are also here. Note that changes will apply to the headings, detail rows or total rows as selected from within the window.

Format column: Comp

Basic Formatting Conditional Formatting

Apply to: **Headings**

Heading text:

Font: Size: Style: **B** *I* U Color:

Calibri
 Cambria
 DejaVu Sans
 DejaVu Sans Mono
 DejaVu Serif
 Garamond

9
 10
 11
 12
 13
 14

Alignment:

< Previous Column Next Column > **OK** Cancel

Clicking the option to hide a column will hide the column that you clicked on.

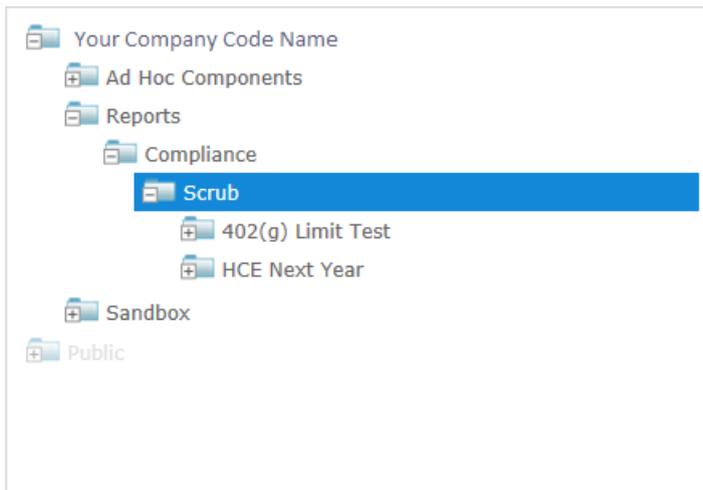
Hovering over the option to "Show columns" will expand the list of columns that are available to be added. You can select the option to add all available columns, or select one at a time.

Saving Custom Reports

After editing a custom report, you can save the report by clicking the save icon (



) in the upper left corner of the web view. You will save your reports in the folder tree under your company name by selecting the "save as" option. Note: See [Permissions](#) for additional information regarding who is permitted to save reports.

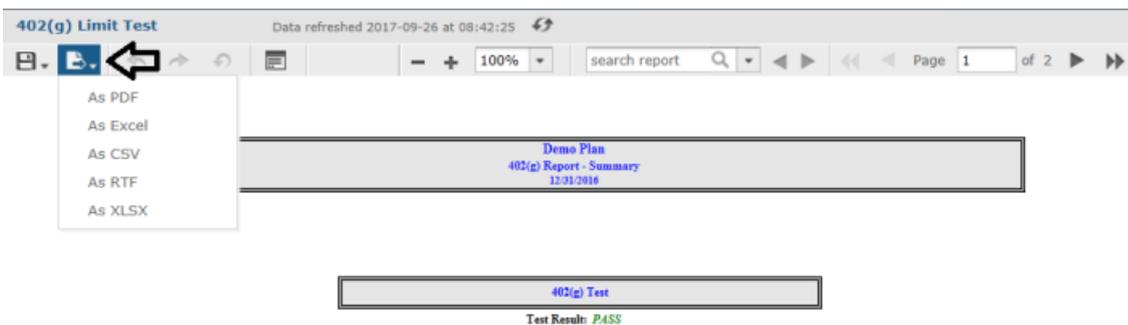


Printing a Custom Report

There are multiple print format options available for each custom report, such as rtf, pdf and excel. Simply click on the applicable icon next to the custom report to print the format of your choosing.

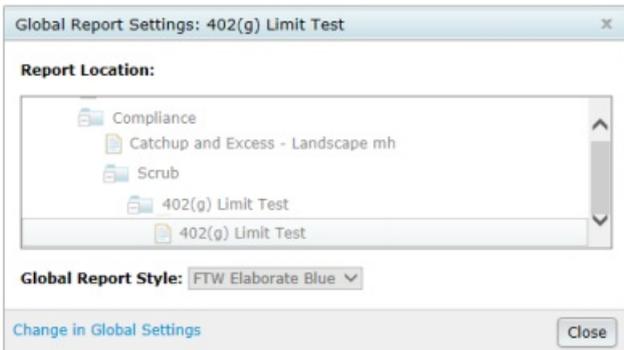
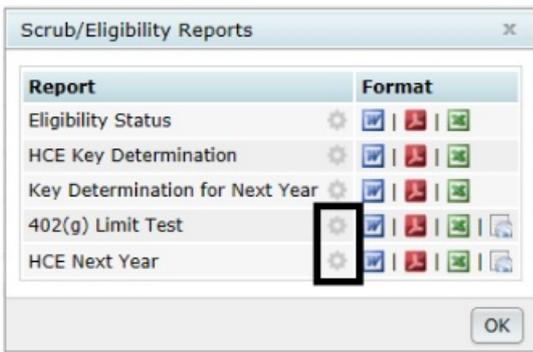


Custom reports can also be printed directly from the web view by clicking the export button in the upper left corner, then selecting the applicable format.



Global Custom Report Styles & Custom Report Selection

To view the current global report style and selected report for a custom report, click the gear icon next to the custom report. This will allow you to see the options selected for that report. Note that the Global Report Style that is selected applies to all custom reports.

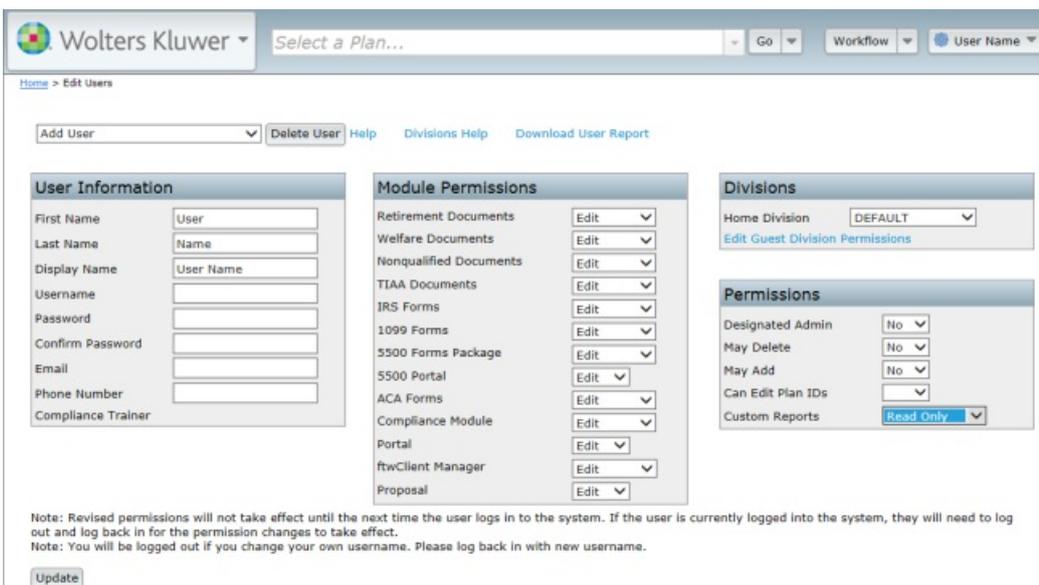


To change these settings, Designated Admin users may either click the "Change in Global Settings" link or navigate to the [Global Report Options](#) from the Compliance Menu.

Print styles that are selected within the web view, will apply for reports printed from the web view only. To specify a specific print style for a report to use in the client package or individual print, the style must be selected from the [Global Report Options](#).

Custom Reports Permissions

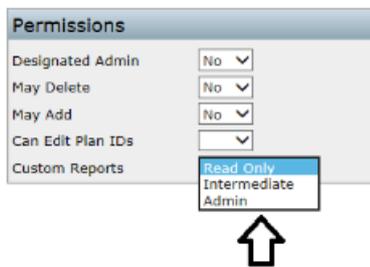
Custom Reports permissions determine whether or not a user can save a custom report and, if permitted to save, the location where they are permitted to save reports. The "Permissions" box in the Edit Users screen has a drop down next to "Custom Reports", containing options of Admin, Intermediate and Read Only.



When in the Custom Reports web view:

- Users with “Admin” selected for Custom Reports are allowed to save reports in any repository folder.
- Users with “Intermediate” selected for Custom Reports are allowed to save reports in the Sandbox folder only.
- Users with “Read Only” selected for Custom Reports are not allowed to save reports in any repository folder.

Note: Any user with “Yes” selected for Designated Admin, receives “Admin” permissions for Custom Reports by default. All other users receive “Read Only” by default. Changes to these permissions would need to be made by a Designated Admin in this screen.



Permissions	
Designated Admin	No
May Delete	No
May Add	No
Can Edit Plan IDs	
Custom Reports	Read Only Intermediate Admin

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