

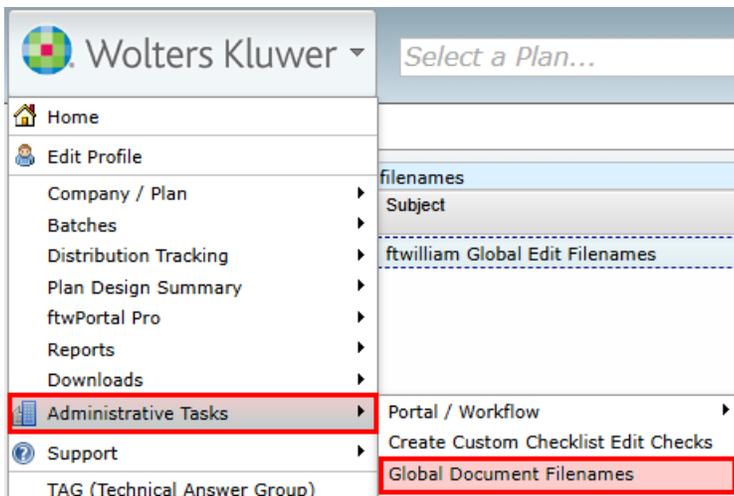
Global Edit File Names

03/05/2026 11:45 am CST

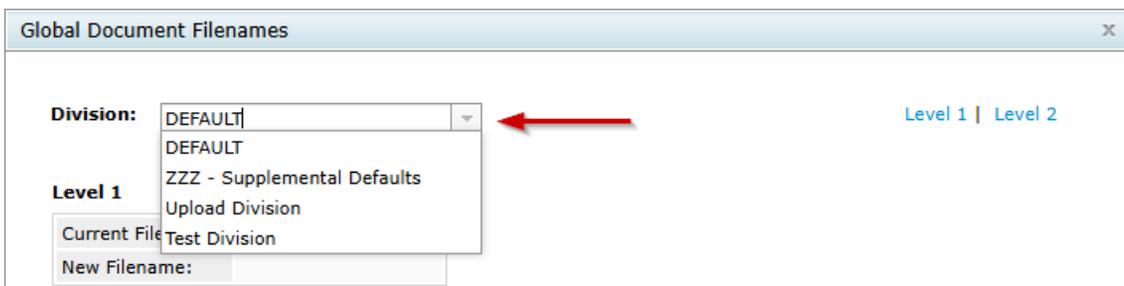
The Global Edit Filenames feature allows users to customize file naming conventions across your entire organization or within specific divisions. When using the “Do with selected” option on the print Plan Document page, users can easily apply filenames and select preferred format, ensuring consistency and efficiency. Master and Designated Admin users have exclusive access to this functionality, enabling them to implement naming standards at both the global and divisional levels for enhanced control and flexibility.

Follow the steps below to establish Global Edit Filenames.

Step 1: From the Wolters Kluwer menu, select Administrative Tasks, then choose Global Document Filenames.



Step 2: If your organization uses divisions, select the division you want to update from the available options.



Step 3: There are two levels of filenames that you can customize.

- Level 1 applies to the folder that is downloaded from the software. This will contain a plan folder and all the files for documents you select.
- Level 2 applies to the file name.



Step 4: To set Level 1, click on the "Level 1" link.

NOTE: To customize filenames by Division, you will first need to have Divisions set up on your account. You can then choose the Division from the drop-down menu.

- **Start with Defaults:** When you begin, the default filename structure will be enabled automatically. This provides a base format for your filenames.

Global Document Filenames

Division: Level 1 Level 2

Level 1

Current File:

New Filename:

Option	Value
Add Element	

- **Add Elements:** To customize the filename structure, click on the "Add Element" link. A drop-down menu will appear. From the drop-down, select any of the available options you want to include in your filename (e.g., Plan Name, etc.). You can add additional elements by clicking on the "Add Element" link.

Global Document Filenames

Division: Level 1 | Level 2

Level 1

Current Filename:

New Filename:

Option	Value
<input type="button" value="↓"/> <input type="button" value="🗑️"/> (Custom) <input type="text" value=""/>	
(Custom)	
(Separator)	
Plan Name	
FTW Plan ID	
PlanID	
Company	
FTW Company ID	
Company ID	

[Reset to](#)

- **Insert a Separator:** You can add a separator between elements for better readability. To add a space between your elements, choose "(Separator)" from the drop-down list.
- **Sort the Order:** To arrange the order of the elements, use the up and down arrows next to each element. Click the arrow to move the element higher or lower in the filename sequence.

- **Remove an Element:** If you decide you do not want a particular option, click the trash can icon next to that element to remove it from your filename structure.
- **Preview the Filename:** Under the "Value" column, you will see a live example of how the filename will appear based on your current selections and the order you have set. In addition, you can view an example of the new filename.
- **Save Your Settings:** Once you are satisfied with the filename structure, make sure to save your changes to apply the customized Level 1 filename format by clicking on the "Ok" button.
- **Reset to Default:** You can reset back to the default filename structure by clicking on the "Reset to Default" link.

Global Document Filenames
x

Division:

[Level 1](#) | [Level 2](#)

Level 1

Current Filename: Plan Name - All Forms
 New Filename: **Company XYZ 401(k) Plan 123ABC**

	Option	Value
↓	Plan Name ▾	Company XYZ 401(k) Plan
↑ ↓	(Separator) ▾	(space) ▾
↑	PlanID ▾	123ABC

[Add Element](#)

Reset to Default

OK

Step 5: To set Level 2, click on the "Level 2" link. Follow the same steps above to customize the filename structure.

Global Document Filenames
x

Division:

[Level 1](#) | **Level 2**