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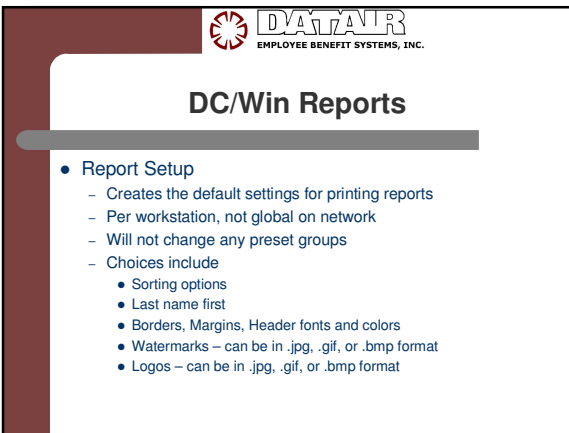
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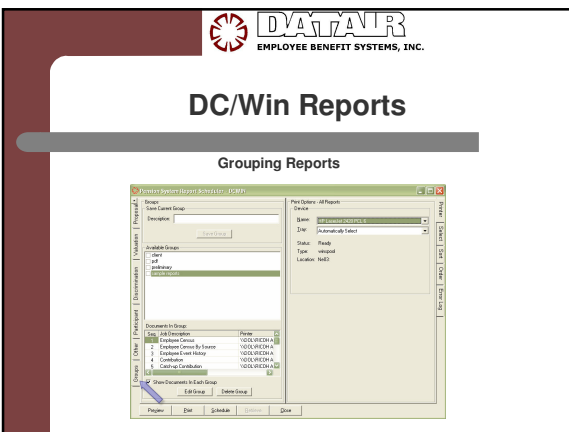
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**DC/Win Reports**

- Grouping Reports
  - Per workstation, not global on network
  - Once created will not be changed by later changes to Report Setup
  - Creating a Group
    - Select all reports and parameters
    - Go to the Group tab
    - Give a name and Save

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**DC/Win Reports**

- Print group
  - Go to the Group Tab and check the group
  - Hit Preview or Print options
  - Can print more than one group at a time
- Editing Group
  - Go to the Group Tab
  - Highlight the Group to change
  - Click on Edit
  - Go back to the individual reports and make changes
  - Go to the Group Tab and click to save group again

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**DC/Win Reports**

- Deleting Group
  - Go to the Group Tab
  - Highlight the Group to Delete
  - Click on Delete

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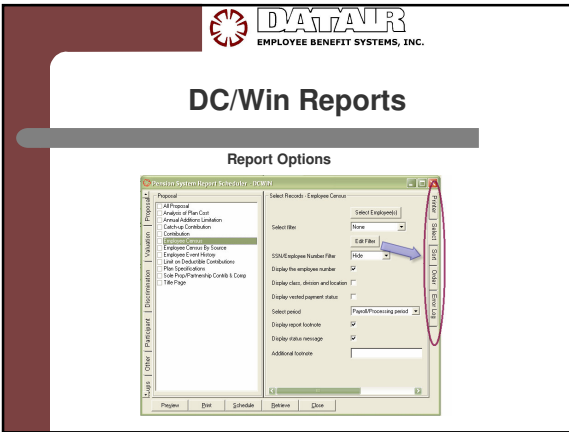
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**DC/Win Reports**

- Report Options
  - Report Setup defaults guide the options, unless changed
  - Printing
    - Printer or File
    - Suppressing Dates, Page Numbers, Plan Idents
    - Margins, Borders, Watermarks, Logos and Fonts
  - Selecting
    - Report options
  - Sorting
  - Ordering
  - Log

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**DC/Win Reports**

- Global Selections to all reports
  - Select Period for dates
  - Show SSN/EEN
  - Display Class, Division, Location
  - Select Employee – except non-discrimination tests
  - Otherwise Excludable and All Together
  - Report Footnotes / Additional Footnote
  - Filters
  - Display Status Message

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### DC/Win Reports

- Not global Selections for reports
  - Display Report Detail / Show Summary
- Show SSN/EEN
- Select EE
- With and Without Detail
  - Account Balance
  - Top Heavy
  - Limit on Deductible Contributions

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### DC/Win Reports

- Print Preview
  - Navigating between Reports
    - Table of Contents
    - Page selections
    - Pull down selection
  - Tool Bar options
  - Binoculars to Search
  - Print Options
  - Export Options

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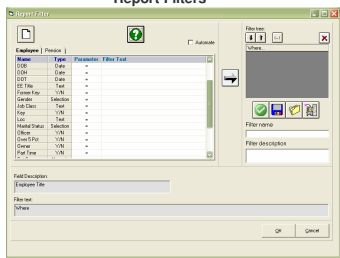
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### DC/Win Reports

Report Filters



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**DC/Win Reports**

- Filters
  - Per workstation, not global on network
  - Creating a filter
  - Validating and saving
  - Choosing a filter when printing
  - Editing filter

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**DC/Win Reports**

- Specific reports to consider
  - Employee Census by Source
  - Vested Balance Report
  - Participant Certificates
    - Employees without Balances
    - Vesting only, no account balances
    - Since Inception
    - Anticipated Date of Participation
  - Required Minimum Distribution
  - 401(a)/410(b) Worksheet
  - Notes
  - Data Comparison
  - Override
  - Company List

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