

## Changes to On-Demand Reporting

The On-Demand Reporting tool is being enhanced to include the ability for TPAs to report across their book of business - for plans on our EASE platform. Additionally we've added plan numbers to the plan name folders (where custom reports might be stored and shared among members of your firm)

If you're not familiar with our On-Demand Reporting tool, it provides you with a number of Standard Reports as well as the ability to produce ad-hoc reports from a number of data elements.

You can view a demo of this tool by visiting our Reference Library section of the TPA Website and selecting the Automated Demos link.

## Changes you can expect to see to On-Demand Reporting

Navigate to the TPA Reports section of the website from the My Workspace page.

The screenshot shows the 'TPA Reports' section of a website. At the top, there is a navigation bar with 'my workspace >> tpa reports' and a 'View Reports Status' link. Below this, there are two main sections: 'Select a Report :' and 'Report Description'. The 'Select a Report :' section contains a list of reports including '5500 Packages', 'Access/Activity Report', 'Auto Enroll Report', 'Benchmark Wizard', 'Deemed/Default Report (ING Loan Program - Payroll Deduct)', 'Deemed/Offset Loans Report', 'Delinquent Loans Report', 'Highest Balance Report (ING Loan Program)', 'Investment Usage Report', 'Loan Amortization Schedule', 'Loan Audit Report (OMNI)', 'Loan Summary Report (ING Loan Program)', 'Loans Past Maturity Date Report', 'Missed First Loan Payment Report', 'Participant Address Report', 'Payroll Feedback Report', and 'Performance Report'. The 'Report Description' section is currently empty. Below these sections, there is a 'Select a Plan :' section with a search box and a 'SEARCH >' button. The search results list several plans, including '776162 TRS OF WORLDWIDE RESTAURANT CONCEPTS 401K SP', '777299 TRS NTS XXCAL INC 401K PROFIT SHARING PLAN', '777586 TRS OF NATIONAL TECHNOLOGY SYSTEMS 401K PS PLAN', '878013 TRS OF GIANT BICYCLE INC 401K PLAN', '878023 TRS OF TEXAS PLYWOOD & LUMBER CO INC EE RP', '878030 TRS OF MAJOR MARKET RETIREMENT PLAN', and '878033 TRS OF PARENTS & CHILDREN TOGETHER 401K PLAN'. At the bottom of the screenshot, there is a callout box with the text: 'On-Demand Reporting is your source for plan activity summaries and historical trend analysis (standard and customizable), for plans utilizing our enhanced TPA Service Model.' Below this text is a button labeled 'ON-DEMAND REPORTING >' with an arrow pointing to it.

From there, select the new button for On-Demand Reporting. You will no longer make a plan selection on this page.

When you enter the tool, you'll see a similar screen as the one pictured below:

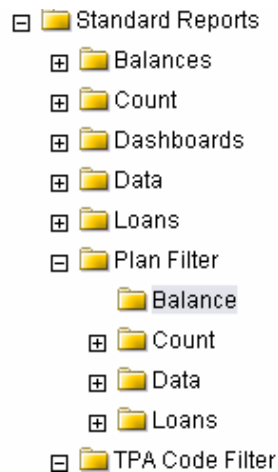
The screenshot shows the ING BusinessObjects InfoView interface. The top left corner features the ING logo and a lion mascot. Below the logo, there are two links: 'Personalize InfoView now' and 'Access Information OnDemand Services'. The main content area contains the text: 'BusinessObjects InfoView collects and presents business intelligence information and provides:' followed by a list of features:

- Complete viewing and interaction for query & analysis, reporting, and performance management
- Integrated collaboration with threaded discussions, intuitive navigation, and support for 3rd party documents
- Advanced scheduling and distribution capabilities making it easier to share information with others
- OnDemand services that enable users to easily access a wide variety of shared information

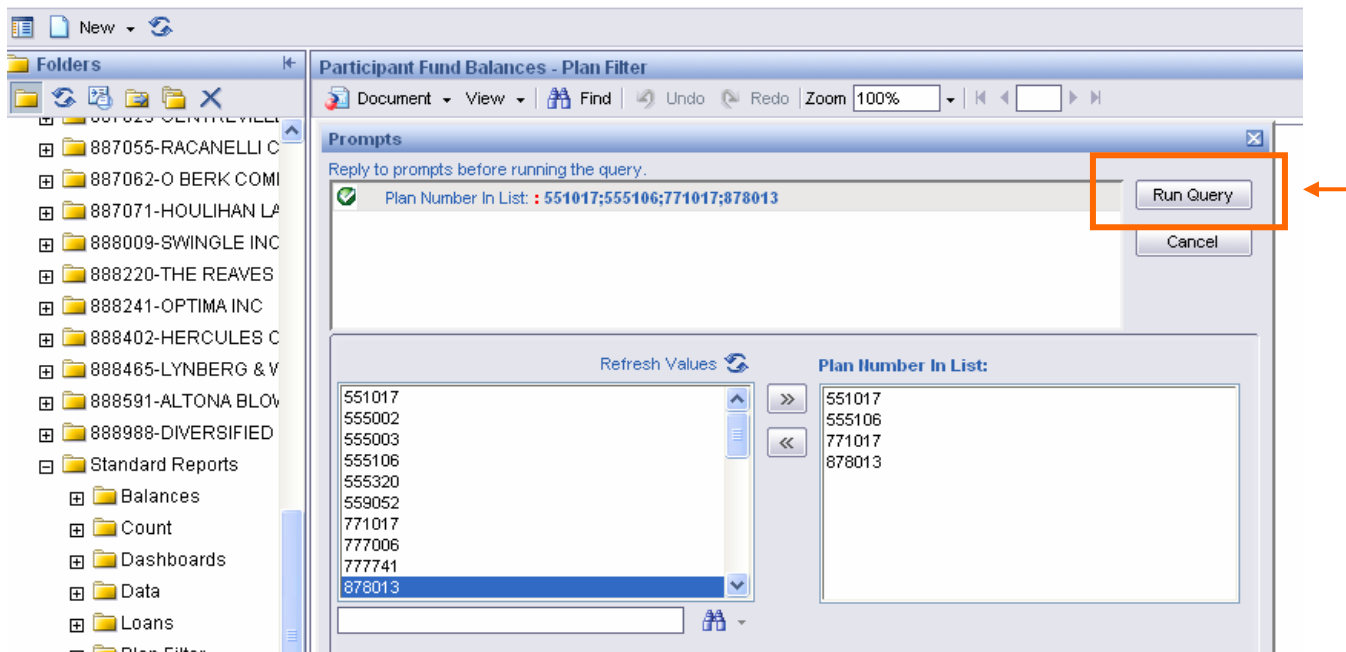
Click on the + next to Public Folders to expand the view. This will display all of the sub folders including the Standard Reports folder.

Click on the + next to Standard Reports. This will expand the view and show you the sub-folders of: Balances / Count / Dashboards / Data / Loans. If you run a report from one of these folders, it will contain data for all of your EASE plans.

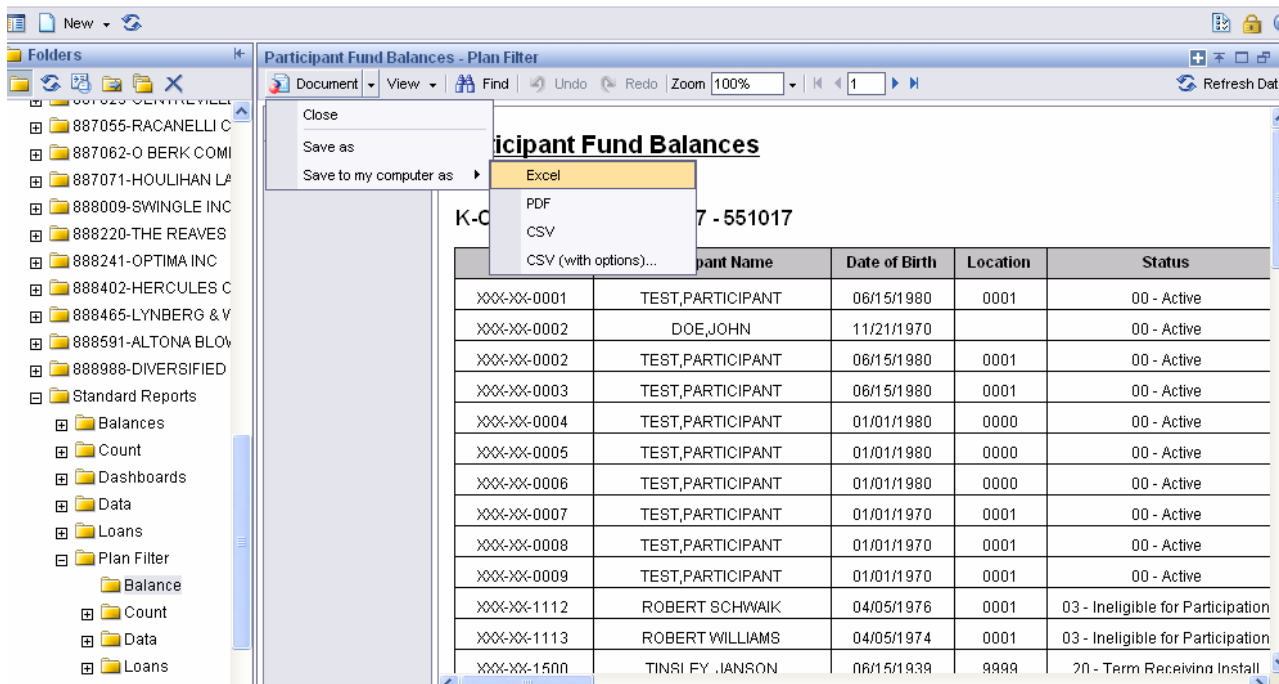
- If you wish to filter your report results by Plan, expand the folder marked Plan Filter and select a sub folder and report. It will prompt you to select the plan(s) you would like to report on.
- If you have access to multiple TPA codes and wish to filter your report results by TPA code, select the sub folder marked TPA Code Filter and it will prompt you to select the code(s) you would like to report on.



The following is an example of a report by Plan Number. Under Plan Filter, the Participant Fund Balance report was selected and then a pop up displays allowing you to select the plan(s) from a list. After you've identified the plan(s) you wish to report against, click on the Run Query button.



From there you can print/save your report by clicking on Document / Save to My Computer as and then select (Excel, PDF or CSV).



You will then be prompted with the choice of either saving to a location of your choice or opening it. Depending on if it is a PDF or Excel file will determine if either Adobe Acrobat or Microsoft Excel.

