

# BLAZE SSI EBPII System

## System Output Options



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# **BLAZE SSI Software EBPII System Output Options**

## **Preface**

**The BLAZE SSI EBPII DB/DC/401(k) Valuation System** supports full valuation, administration and plan studies for qualified defined benefit, defined contribution, and 401(k) plans. Insurance companies, TPAs, actuarial firms, banks, financial planners and plan sponsors nationwide use EBPII for efficient plan processing.

**EBPII** is available as an integrated system to process DB, DC and 401(k) plans or as a stand-alone version to process only DB or to process only DC/401(k) style plans.

**EBPII** uses .pdf-format document technology, which has many advantages, including:

1. Use of graphics, fonts, character stroke-weight, etc.
2. Superior print preview of documents that replicate the printed format on-screen
3. Enhanced security of documents
4. Compatibility with commercial document management systems
5. Consistent document printing in any environment
6. Convenient electronic transmission (e-mail) of documents
7. Industry-standard document format
8. Compatibility with .pdf-format utilities and editors from many suppliers

## **Additional Information**

The BLAZE SSI EBPII System Intro Guides and the on-line user documentation included within EBPII include extensive information about generating output and printing results from EBPII. This documentation is available to licensees and 'demo' users of EBPII. Please refer to this documentation for additional information.

More information about EBPII and other products may be obtained from BLAZE SSI:

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# **BLAZE SSI Software**

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### **A. Report Categories**

EBPII DB/DC System reports are divided into broad two categories: Defined Benefit and Defined Contribution. Within these two categories are four sub-categories:

**1. Summary**

Reports that describe the plan, for example, the plan provisions report, but do not illustrate specific employees.

**2. Composite**

Reports that list all employees, for example, the employee census report.

**3. Individual**

Reports that illustrate only one participant per 'report' page, for example, a participant statement.

**4. Special**

Utility reports (for example, the residue report) and system documentation (for example, the User Documentation).

There are over 80 DB reports and 80 DC reports included with EBPII. Users review the available formats and learn to modify the formats during EBPII Basic Training. As a follow-up to Basic Training, there is information about printing in the Intro Guide.

### **B. Printing Reports**

Printing reports is as simple as choosing from a list of available formats. The reports are created in pdf format and may be viewed on the screen, sent as an email attachment or printed to the selected printer. Printing is covered in EBPII Basic Training and there is information about printing in the Intro Guide.

A set of reports may be selected and saved in a user-specific 'Report Queue,' which can be saved for repeated use.

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### **C. Modifying Output Report Formats Using BLAZE SSI Provided Tools**

There is a wide range of options available within BLAZE SSI software to modify report formats or to create new report formats. The options vary from very simple techniques that any novice user can use successfully to options that are more suitable for users with database and commercial report writer experience. Some are optional system features. Most users are quite satisfied with the options that are included in the base system cost.

- 1. SIMPLE (no cost): Pre-Print Questions (PPQ).** Users can modify any report format by answering 'pre-print' questions. This technique was developed by BLAZE SSI to help users modify report formats using only English language requests. This simple technique requires no programming knowledge and supports many popular options such as including/excluding specific data; cosmetic alterations; landscape vs. portrait orientation; etc.
- 2. SIMPLE (no cost): Footers.** The user has control over the contents, format and placement of footnotes that can be printed on the reports. Users may insert one or more lines of text that can print on all or only designated reports. Page numbers, dates, report numbers, etc. may be set to print or not print.
- 3. SIMPLE (cost item): Custom Report Formats.** BLAZE SSI will create custom EBPII reports for a user for a reasonable cost. These reports will then be available in the system Report Queue. Contact BLAZE SSI if you are interested in this additional support.
- 4. MODERATE (cost item): Census Update Form Generator (Report #65/465).** BLAZE SSI licenses a report generator to create a census update form. If you would like to modify the format of the census data collection form, this simple report generator gives you all the flexibility you need.
- 5. MODERATE (no cost): Logos and watermarks.** Any or all reports may have a logo or a watermark printed in a user-determined spot on the page.

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- 6. MODERATE (no cost): Participant Statement Generator (Report #60/460).** EBPII DB/DC includes a report generator that provides maximum flexibility for creating participant statements. No programming skill is needed and no additional software is required. The standard BLAZE SSI maintenance agreement includes this feature and instruction for its use is included in the system documentation.

Features include selection order and page position of included data fields and creation and selection of notes and text paragraphs.

- 7. MODERATE (cost item): Variable Report Generator (Report #57/457).** This proprietary product provides flexible character-based report generation of summary, composite or individual formats. The variable report generator provides the user with an extensive selection of well-defined plan and employee data fields that are identified via a mnemonic field name to simplify the creation of a new report format. Users may find this report generator easier to learn than a commercial product such as Crystal Reports.

Features include selection order and page position of included data fields and creation and selection of notes and text paragraphs.

### **D. Creating Output Report Formats Using Commercial Tools**

Every table and field in the EBPII database is extensively and carefully documented. All input values, all calculated values and many 'intermediate' values are included in the database. The documentation is easy to access and is included in the license of the EBPII software.

Because these values are readily accessible, users may elect to create reports for either one-time or repeated use through a variety of commercially available products such as word processing, spreadsheet, report generation and database software.

- 1. USING A COMMERCIAL REPORT GENERATOR.** EBPII supports the use of commercial report generators such as Crystal Reports or the report generator supplied with compatible databases. There is no additional cost to use this feature. It is the customer's responsibility to acquire and learn to use a commercial report generator.

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- 2. USING WORD PROCESSING.** EBPII exports any data selected by the user into ASCII field and record delimited files that can be 'merged' into report format templates created with commercial WP software such as MS Word. The utility that supports the export of data into a file (AUDIT/Export) is an optional EBPII feature. It is the customer's responsibility to acquire and learn to use commercial WP software such as MS Word.
  
- 3. USING MS EXCEL.** EBPII exports a subset of the EBPII census data directly into MS Excel. Data can then be edited and printed from this MS Excel worksheet. There is no cost associated with this option.

If a user wants data in addition to that which is available in the EBPII direct link to MS Excel, then the user may use the optional EBPII AUDIT/Export feature, which supports the export of any data selected by the user to a .csv format file. Such a file is easily opened in MS Excel.

It is the customer's responsibility to acquire and learn to use commercial spreadsheet software such as MS Excel.

- 4. USING A COMMERCIAL DATABASE.** EBPII data may be stored in an MS Access, MS SQL or other ODBC database at the user's option. Reports may be created and printed using the available database tools provided the user has a license for the database. It is the customer's responsibility to acquire and learn to use MS Access or other selected database.