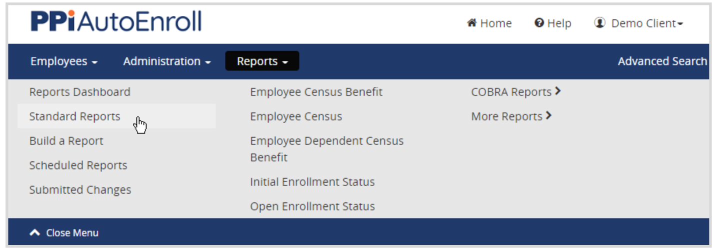
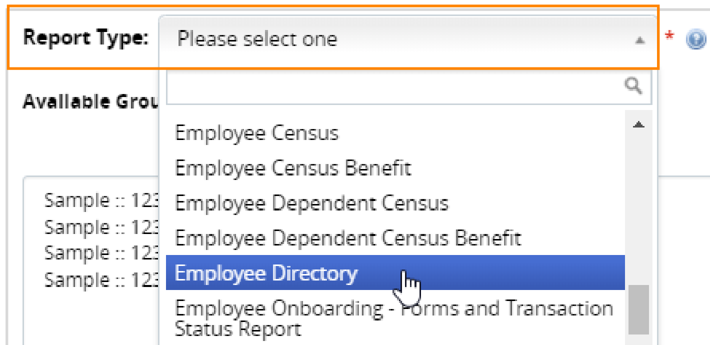
AutoEnroll
How to Run Reports

1. Log into AutoEnroll at **www.ppienroll.com**.
2. Click on the “Reports” button in the navigation toolbar at the top of the screen.
3. Select a report from the options, or click on the “Standard Reports” link, and select a report from the “Report Type” dropdown menu.

   An “advanced” link is available for some reports and allows you to select which fields to include in your report.

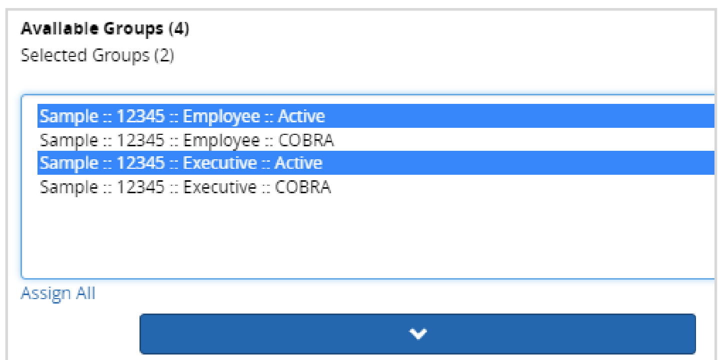
   Information regarding the different types of reports is available under the “How-To” section of the PPI Client Help Center on www.ppibenefits.com.





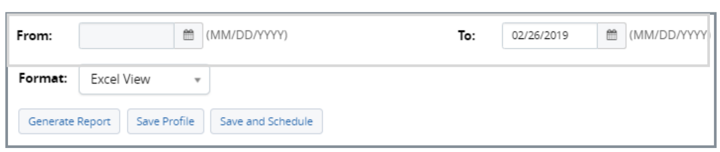
4. Select the structure groups that you would like to include in your report, and use the up and down buttons to move them from the Available Groups box into the Selected Groups box.

   You may select all, or use the Ctrl key to select specific structure groups. You can also use the search bar to find structure groups.



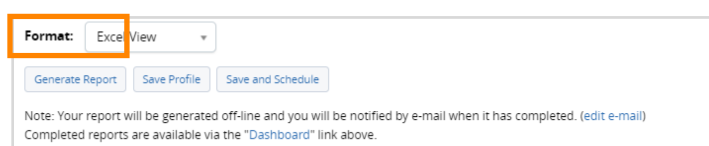
5. Fill in the “To” date, which is the point in time at which the data reported will end. The system defaults this field to the current date if nothing is entered.

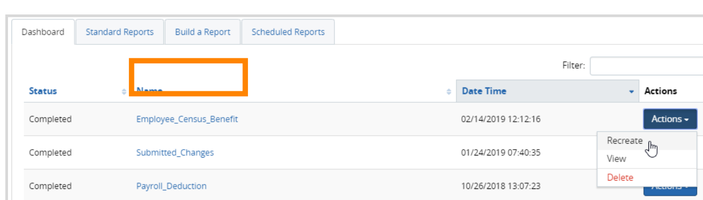
   The “From” date represents the point in time for which the data reported begins. This field is optional for most report types and is not available for some.



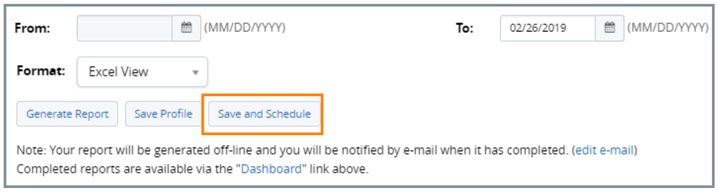
6. Once you’ve completed all of the required information, click the “Generate Report” button.

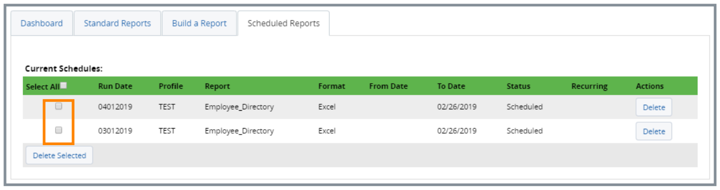
   This will redirect you to the Reports Dashboard. You will recieve an email when your report is ready. Click on the report name in the Reports dashboard to open and download the report.





To setup a scheduled report, click “Save and Schedule” and in the popup, enter a profile name for your report. In the next popup, select a Run Date the report will run and click “Add.” Continue to click “Save and Schedule” and select as many run dates for future reports as desired. When finished scheduling future reports, click on the “Scheduled Reports” tab, to view all scheduled reports. You can also delete scheduled reports from this page.

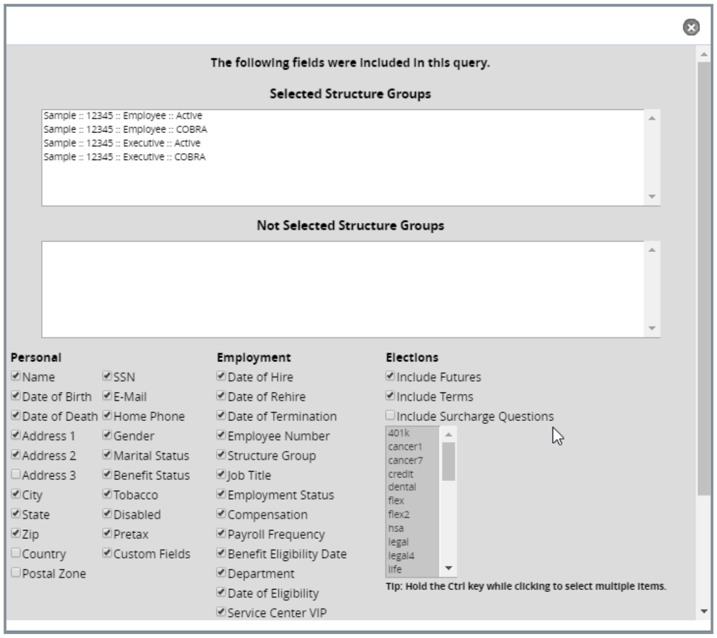




7. From the action menu in the Reports Dashboard, you can delete, view, or recreate previously run reports.

To recreate a report, select “Recreate” from the “Actions” dropdown to open the report in the Standard Reports tab. The report paramerters from the previously generated report will already be set. Make sure to update fields and date ranges as necessary.

Clicking the “View” button will show you the parameters set on the original report, including structure groups, and any “Advanced” field options. However, you cannot re-run the report using this button.



You can sort reports in the dashboard by clicking on any of the column head names, or make searching for a report easier by using the Filter field.