

Note – This guide covers the new reporting module that is currently in early release and may not be accessible to all users.

Navigation

The reporting screen is broken into three main sections:

1. **Report selection menu** – Contains all the pre-configured and custom reports that can be run
2. **Filter menu** – Controls dates and employers returned in reports
3. **Results and controls** – Displays report data and provides controls for each report

SuperChoice ✓ Employer Portal Reporting JBORDER

1 Submissions Payments Fund refunds Incorrect data Member responses

Pre configured and custom reports menu

2 FILTER REPORT

Pay Period Start Date: 21-01-2025 to 19-02-2025
Submission date (selected)
Employer: 2 selected

Report date range filter and employer filter

Search Save as new report

3 SEARCH RESULTS

Given Name ¹⁴	Last Name ¹⁴	Pay Period Start Date	Pay Period End Date ¹⁴	Contribution Status ¹⁴	Member response ¹⁴	Fund Name ¹⁴
No records to display						

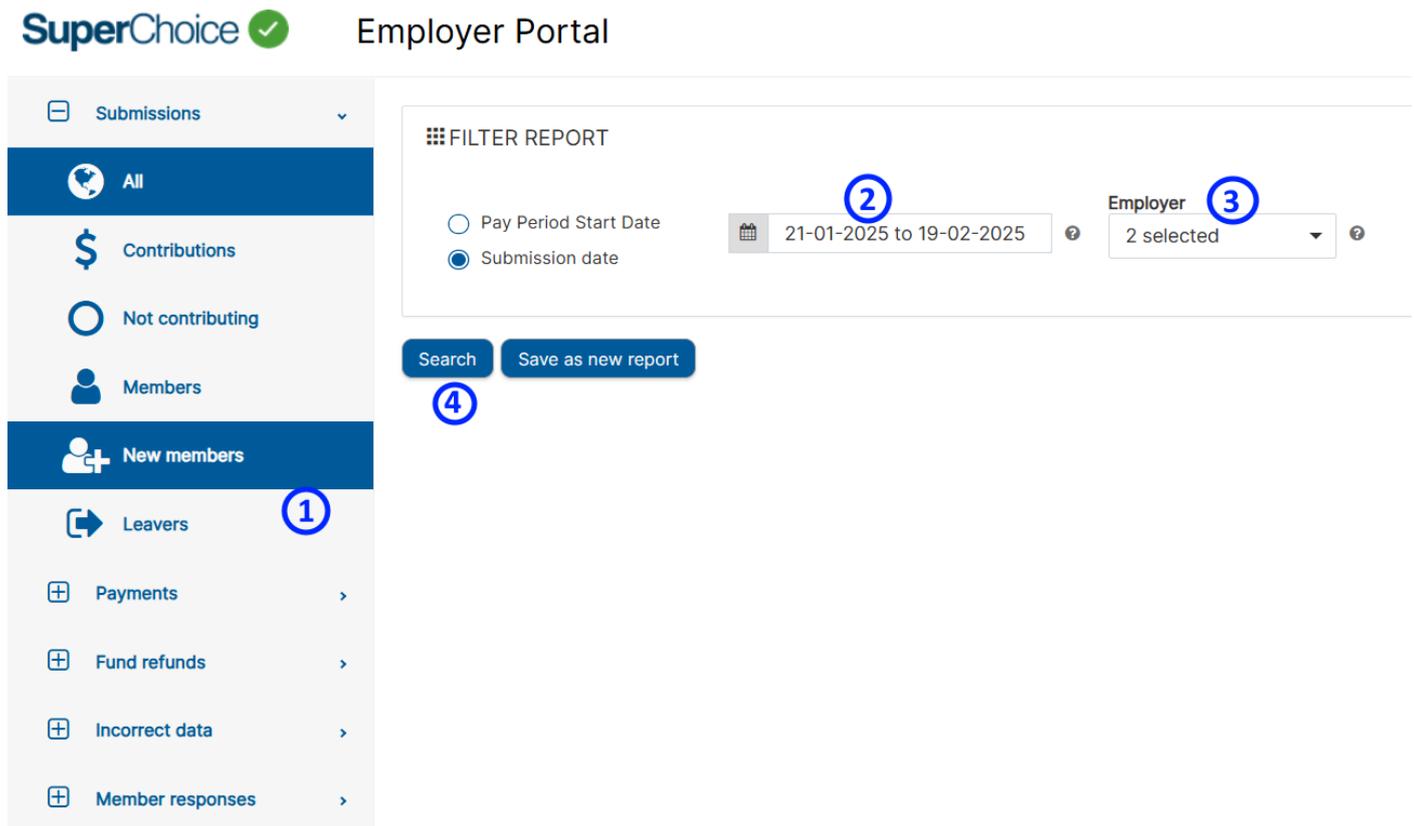
Rows per page: 10

Collapse sidebar

Running reports

To run a report, the following steps should be taken:

1. Select the report you want to run
2. Select the date range required
3. Select employers for the report
4. Click **Search**



The screenshot shows the SuperChoice Employer Portal interface. On the left is a navigation menu with categories: Submissions, All, Contributions, Not contributing, Members, New members, Leavers, Payments, Fund refunds, Incorrect data, and Member responses. The 'Leavers' option is highlighted with a blue circle containing the number '1'. The main area is titled 'FILTER REPORT' and contains two radio buttons: 'Pay Period Start Date' and 'Submission date', with the latter selected. To the right of these is a date range input field showing '21-01-2025 to 19-02-2025' with a blue circle containing the number '2'. Further right is an 'Employer' dropdown menu showing '2 selected' with a blue circle containing the number '3'. Below the filter area are two buttons: 'Search' and 'Save as new report', with a blue circle containing the number '4' positioned below the 'Search' button.

5. (Optional) Modify report and display controls as required (see below)

Saving and modifying reports

Pre-configured and custom reports can be modified to suit the user. Changes can be made to the data displayed as well as visual display options such as visual density.

ICON	NAME	USAGE
	Export Data	This button will download the data displayed in the report search results
	Save preferences	This button can be used to retain any changes to display settings for the next time the user runs this particular report.
	Reset default preferences	Any preferences previously saved for a particular report can be reset by clicking this button. Restores the report back to its original parameters.
	Show/Hide filters	<p>Clicking this will display an additional control for each column. Entering a value in that column will filter all values by the entered value. y the entered value.</p> <p>For example, clicking Show/Hide filters on a report, then entering “John” on the Given name column, will filter all values in that column to only show rows that contain “John”</p> <div data-bbox="438 1220 1364 1534" data-label="Image"> </div>

	<p>Show/Hide columns</p>	<p>Clicking this button will display controls for report columns:</p> <div style="text-align: center; margin-bottom: 10px;"> Hide all Reset order Unpin all Show all </div> <hr/> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Given Name <input checked="" type="checkbox"/> Last Name <li style="background-color: #f0f0f0;"> <input checked="" type="checkbox"/> Fund Name <input checked="" type="checkbox"/> Member response <input checked="" type="checkbox"/> Superannuation Guarantee Amount <input checked="" type="checkbox"/> Personal Amount <input checked="" type="checkbox"/> Salary SacrificedAmount <input checked="" type="checkbox"/> Spouse Amount <input checked="" type="checkbox"/> File Name <input checked="" type="checkbox"/> Payroll No. <p>Hide all – This will hide all currently configured fields for the report</p> <p>Reset Order – Restores the original field order for the report</p> <p>Unpin all – This will unpin any fields currently pinned in the report</p> <p>Show all – Will display all fields for the current report.</p> <p>Note – It is not recommended this option be used due to the large number of fields stored in the system.</p>
	<p>Toggle density</p>	<p>This will modify the amount of data visible on screen. Useful if the user needs to focus in on a particular value, in which case they might reduce the data density.</p> <p>The icon will change to indicate the current density level:</p> <ul style="list-style-type: none"> Highest density (most data visible) Medium density Lowest density (least data visible)

	Toggle fullscreen	When pressed, this will remove the data and employer filters from the top section of the screen and extend the report data search results to take the whole top to bottom screen real estate.
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