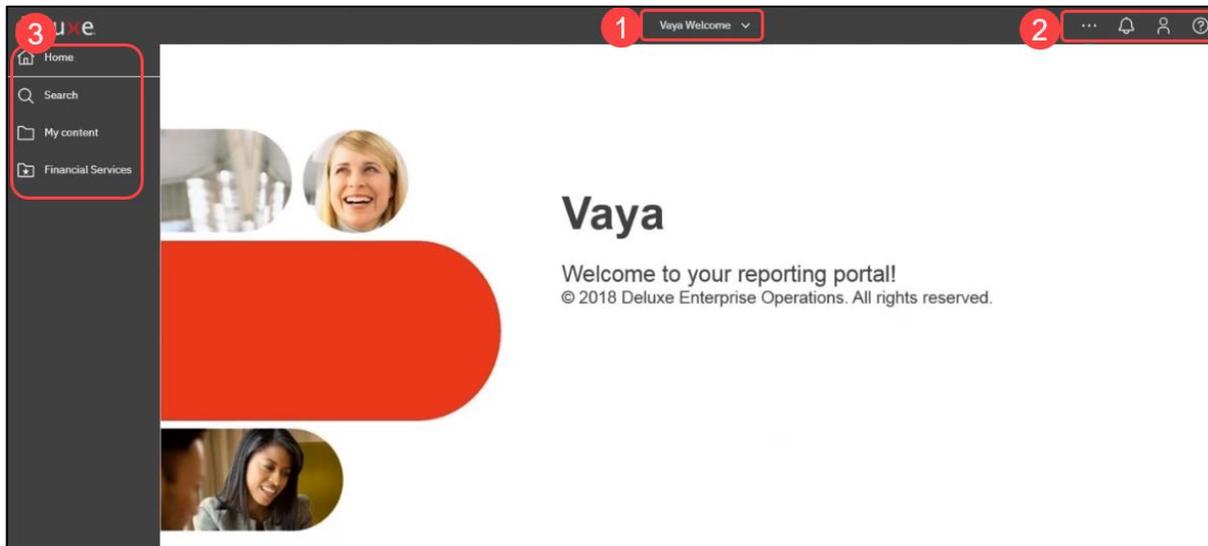


Welcome to Deluxe Reporting

Our reporting tool, powered by IBM Cognos Analytics, gives you the ability to access the data you need, when you need it. The report tabs provide key information, so you can view metrics to measure your success.

Home Page



#	Field/Area	Description															
1	Open Items	Displays links to reports that are open and allows you to close them.															
2	Application Bar	<table border="1"> <thead> <tr> <th>Icon</th> <th>Name</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td></td> <td>More</td> <td>Used to set current report as your home page or to subscribe to a report (after initial run) to have it run on a schedule.</td> </tr> <tr> <td></td> <td>Notifications</td> <td>Used to view system activity notifications applicable to you.</td> </tr> <tr> <td></td> <td>User (your name)</td> <td>Used to view options, like setting preferences and signing out.</td> </tr> <tr> <td></td> <td>Help</td> <td>Not used. Does not contain Deluxe-specific information.</td> </tr> </tbody> </table>	Icon	Name	Details		More	Used to set current report as your home page or to subscribe to a report (after initial run) to have it run on a schedule.		Notifications	Used to view system activity notifications applicable to you.		User (your name)	Used to view options, like setting preferences and signing out.		Help	Not used. Does not contain Deluxe-specific information.
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Log On

To log on to Deluxe Reporting, do the following:

1. Log on to Vaya, click the Deluxe Reporting link, and click the Vaya Reporting link.
[Result: The reporting log on screen appears.]
2. Select 'Deluxe Clients'.
3. Type your Vaya sign on information in the User ID and Password fields and click 'Sign In'.

Log Off

When finished with the session, click in the upper right and select 'Sign out'.

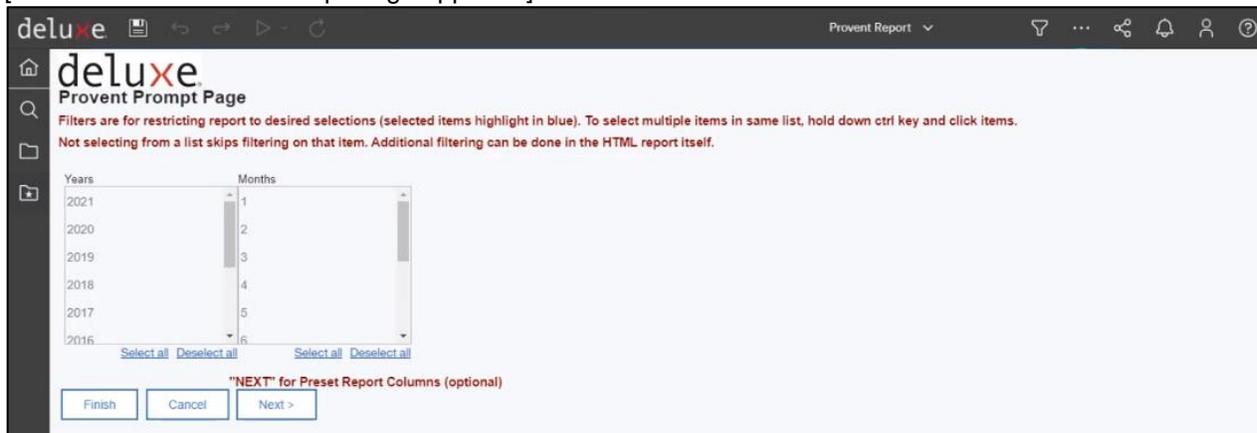
Deluxe Reporting Issue/Request

For reporting issues/requests, send an email to Vaya@deluxe.com.

Run Report

To run the Provent report, do the following:

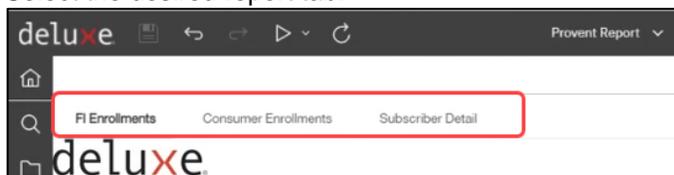
1. Click the 'Financial Services' folder on the left, click the 'Provent' folder, and click the 'Provent Report' link. [Result: The Provent Prompt Page appears.]



2. Complete the report prompt page by doing the following:

- a. Select timeframe filters, if desired.
NOTE: The default is all months for previous years and what has been loaded for the current year.
- b. Do one of the following:
 - Click 'Finish' to run the report with all available data (not filtered) within timeframe selected.
 - Click 'Next' to preset optional data to be viewed for each report tab before running report, if desired, and then click 'Finish'.
NOTE: The optional report columns can also be selected or changed on each individual tab after running the report.

3. Select the desired report tab.



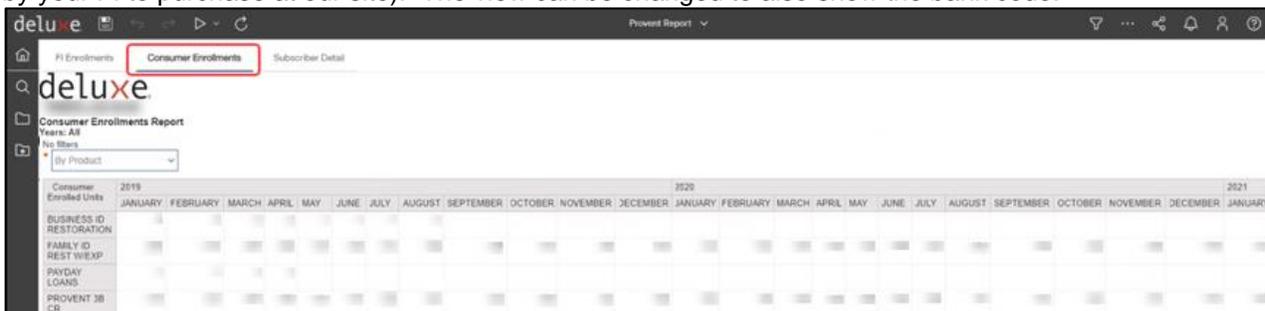
FI Enrollments

This tab shows total number of FI enrolled subscribers by Provent package by month. The view can be changed to show various options (by product, by status, etc.).

Current Subscriber Units	2019												2020											
	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
FI PAID IDPROTECTPLUS																								
FI PAID IDRESTOR PRO																								
RETAIL ID RESTOR PRO																								
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Summary																								

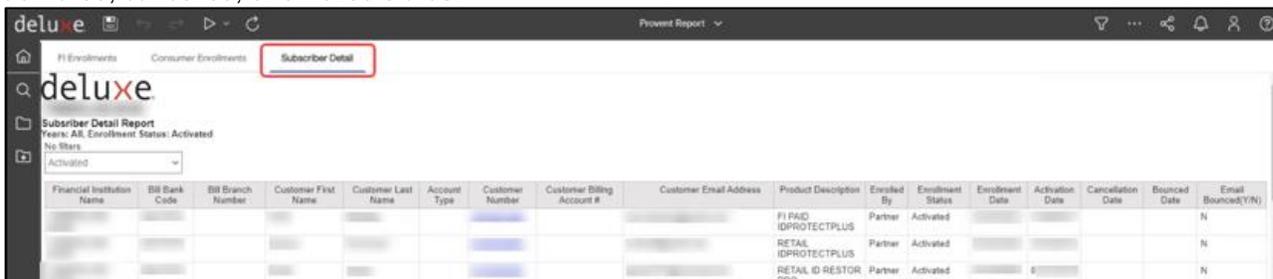
Consumer Enrollments

This tab shows total account holders associated with your FI who purchased a Provent product directly from Deluxe Provent (either upgraded from an FI enrollment package to purchase additional coverage or referred by your FI to purchase at our site). The view can be changed to also show the bank code.



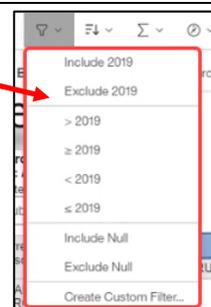
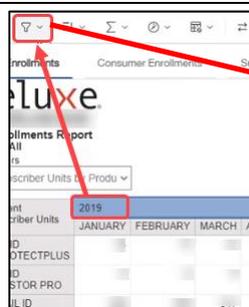
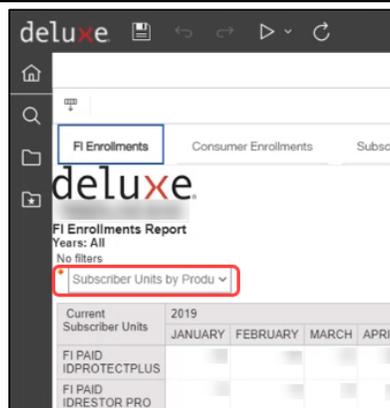
Subscriber Detail

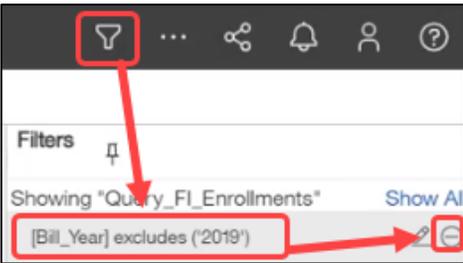
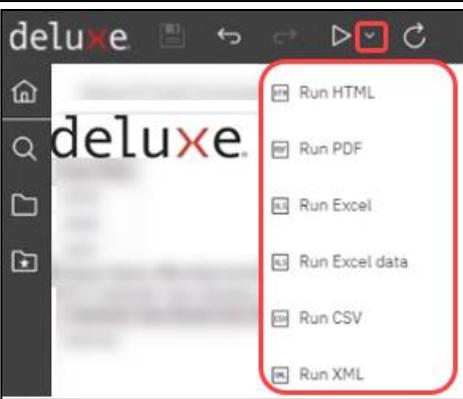
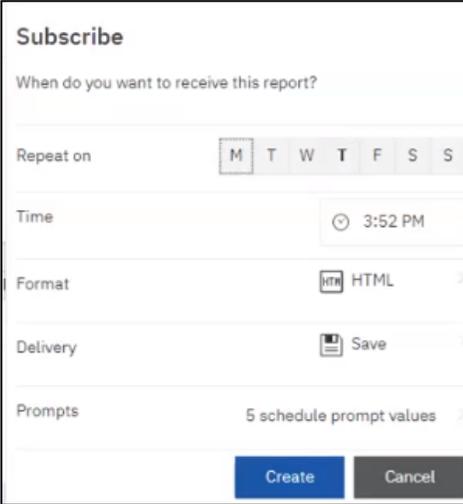
This tab shows details for all account holders in an FI enrollment package (either sent to Deluxe Provent via FTP set up with Deluxe or via the secure web enrollment portal). The view can be changed to show activated, cancelled, or enrolled status.



4. Use the following table to work with the report.

To...	Do the following...
<p>Filter view</p>	<p>Click the drop-down field(s) above the data and select the data to be viewed.</p> <p>NOTE: The option shown is what is selected or is the default if nothing was selected.</p>
<p>Filter by column/row</p>	<p>Click the column or row title, click  (filter icon) in the bar that appears, and select option to include or exclude the element.</p> <p>NOTE: Hold 'Ctrl' key to select multiple options (Ex: 2019 and 2020).</p>



To...	Do the following...	
Remove filters	Click  in the upper right, click (or hover over) data filter, and click  (minus sign) icon.	
Run report in another format	Click  (to the right of the run button), click desired option (Run Excel, Run PDF, etc.), and follow prompts based on your browser/software version (including clicking "Save" and the software button in the bottom left, if applicable).  NOTE: If 'Run Excel' is selected, all report tabs appear as a separate spreadsheet tab in the workbook and the report name, timeframe, institution name, and any other selected filters appear at the top of each tab.	
Subscribe to the report to have it run on a schedule (data is preloaded, reducing wait time)	Click  at the top right, click 'Subscribe, select the information regarding when/how you want the report to be run and click 'Create'. NOTES: <ul style="list-style-type: none"> Initial prompt page – Ensure no timeframe filters were selected on the initial prompt page, as selecting year or month would continually run the same report timeframe. Format – For large reports, select 'Excel' format to avoid possible memory error. Delivery – Select 'Save', as 'Send report by email' will not work. When report is ready, a notification number appears by the bell icon. To open the report, click bell icon, click the notification, and click the link to open the report/Excel.	 
Close report	Click  at the top middle of the screen and click  to the right of the report.	